

City of Charleston

CONSOLIDATED ANNUAL PERFORMANCE & EVALUATION REPORT

2008 - 2009

Joseph P. Riley, Jr.
Mayor



Pictured above: Cool Blow Development the *first permitted development under the new MU II Workforce Housing Ordinance*

Department of Housing & Community Development
145 King Street, Suite 400
Charleston, SC 29401
Geona Shaw Johnson, Director

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Executive Summary

The Consolidated Annual Performance and Evaluation Report (CAPER) is a comprehensive document that describes the accomplishments fulfilled during the City's program year: June 1, 2008 to May 31, 2009. This report provides a summary of accomplishments and illustrates the goals achieved by the City of Charleston and its many partners.

Overall, the City of Charleston impacted 862 households through homeownership opportunities, rental units, owner-occupied rehabilitation, lead paint hazard removal, tenant-based rental assistance and short-term mortgage, rent and utility assistance during the 2008-2009 program year. The City also worked with its partners to improve services available to homeless persons, create youth development opportunities, and expand economic opportunities, particularly in the Renewal Community. Some highlights of the program year are detailed below.

Housing

- ✓ *Six houses were sold under the City's homeownership initiative during the program year.*
- ✓ *Sea Island Habitat constructed four single family homes in the Brownswood Place neighborhood. Four homeowners were also selected for the homes.*
- ✓ *The One Cool Blow Street Development, is the first permitted development under the new MU II Workforce Housing Ordinance providing fifteen percent Workforce Housing.*
- ✓ *Charleston Trident Urban League's Fair Housing education seminar was completed by 42 persons. More than 100 persons were provided one-on-one credit counseling.*
- ✓ *The Charleston Trident Urban League's Fair Housing Hotline received 302 calls from citizens concerning their rights as a tenant.*
- ✓ *Approximately eighty (80) people have completed the Charleston Area CDC's financial literacy class in the past year.*
- ✓ *Thirty-four (34) homeowners were provided new roofs through the City's Roof Replacement Program. One house was provided minor repairs through the City's Minor Repair Program.*
- ✓ *Seventy-two (72) houses were cleared of lead paint hazards through the City's Lead Hazard Control Program.*
- ✓ *The Charleston Area CDC assisted four homeowners with major repairs during the program year.*
- ✓ *Through the City's partnership with the City of North Charleston four (4) homes were completed under the City of North Charleston's Minor Repair program.*
- ✓ *P.A.S.T.O.R.S., Inc., working in partnership with the Space Company, rented two units during the program year.*
- ✓ *Through the award of Enston Home funds, the Lowcountry Housing & Economic Development Foundation Incorporated provided 40 households mortgage, rent & utility assistance; United Methodist Relief Center, will build two (2) Elderly Transportable Cottages (ET); Operation Home will provide critical home repairs to three (3) very low income seniors; Canterbury House, Humanities Foundation, Ansonborough House and Trident Area Agency*

on Aging will provide rent, mortgage and utility assistance to residents, which will mitigate homelessness.

- ✓ *The Lowcountry Housing Trust was designated a Community Development Financial Institution (CDFI), which will allow the organization to access additional sources of capital. The Trust has hired a loan officer to implement new financial products.*
- ✓ *The Lowcountry Housing Trust served as the Lead Entity in the pursuit of Neighborhood Stabilization Program funding for the Tri-county area. The City of Charleston secured an award of \$670,000 in Neighborhood Stabilization Funding Round I. The City of Charleston was awarded a total of \$1,634,830.00, which will equate to a total of 23 homes; 20 rental homes and three ownership.*

Homelessness and Special Needs

- ✓ *The Lowcountry Continuum of Care Partnership was awarded **\$336,995** to fund a total of 6 new projects.*
- ✓ *Crisis Ministries assisted 84 persons transitioning from the homeless shelter to permanent housing.*
- ✓ *ShelterNet, an initiative of the Humanities Foundation, provided 255 households with emergency housing or utility assistance during the program year.*
- ✓ *Lowcountry AIDS Services provided 247 clients housing assistance. In all, the organization assisted 557 clients during the program year.*
- ✓ *Roper Saint Francis Ryan White Program provided 93 clients with housing assistance and provided services to a total of 339 persons.*

Public Housing

- ✓ *The City of Charleston Housing Authority retained its high performer status for Public Housing Authorities.*
- ✓ *The Authority also secured an allocation of 72 Housing Choice Vouchers (HCV) to support the partnership with the Veterans Affairs department. Thirty four are currently under contract.*
- ✓ *The City of Charleston housing Authority is reviewing an opportunity to purchase 670 and 676 King from the Volunteers of America. The Authorities' purchase of these properties will ensure long-term sustainability of the rental homes.*

Community and Economic Development

- ✓ *The Greater Charleston Empowerment Corporation (GCEC) continued community improvement efforts through partnerships with the South Carolina Employment Security Commission, the Magnolia Give Back Foundation, along with other Renewal Community businesses.*
- ✓ *The GCEC awarded scholarships to six residents of the Renewal Community.*

- ✓ *Approximately 50 students participated in the City's Weed and Seed Program during the past year.*
- ✓ *The Renewal Community's Franklin C. Fetter Clinic served 5000 clients during the program year.*
- ✓ *Renewal Community tax credits were awarded to six businesses, totaling \$12,000,000. These incentives are projected to create 111 and to retain 26 jobs.*
- ✓ *During the program year, the City awarded \$118,025 to Section 3-qualified contractors.*
- ✓ *The Charleston Citywide Local Development Corporation (LDC) provided extensive one-on-one technical assistance to over 109 businesses, many of which are located in Charleston's Renewal Community.*

Introduction

The City of Charleston completed its 2005-2010 Consolidated Plan (Con Plan) in April 2005. The Con Plan was approved by City Council April 2005 and submitted to the U.S. Department of Housing and Urban Development (HUD) for approval April 15, 2005. The Consolidated Plan is a comprehensive strategic planning document for use in revitalization, community and economic development, housing initiatives, and neighborhood stabilization for the City of Charleston as required by HUD.

The five-year plan is a guide in implementing projects and programs that help the City's Department of Housing and Community Development to realize defined goals and objectives in achieving its overall mission which is to create, facilitate, and implement activities and programs which stimulate community and economic development, expand the supply of affordable housing and stimulate the construction and rehabilitation of housing for persons of very low, low and moderate incomes in Charleston's neighborhoods. The City is pleased to have accomplished many of the goals that were outlined in the 2005-2010 plan.

The City of Charleston's Department of Housing and Community Development has illustrated their commitment to implement their mission, by;

- Providing first-time homeownership opportunities;
- Award housing financing;
- Rehabilitating the housing stock;
- Removing lead paint hazards;
- Creating job opportunities for low- and moderate-income persons;
- Enhancing opportunities for businesses in the Renewal Community;
- Supporting the development of community centers and activities;
- Providing technical assistance and community services to neighborhood residents and neighborhood councils; and
- Partnering with for-profit and non-profit organizations to provide housing and services for low- to moderate-income citizens.

During the program year, the City of Charleston was allocated \$1,056,089 in Community Development Block Grant (CDBG) funds, \$826,621 in HOME Investment Partnership funds, and \$437,946 in Housing Opportunities for Persons with AIDS funds (HOPWA) to fulfill its mission in the areas of affordable housing, community revitalization, and economic development initiatives. The City of Charleston is also a federally-designated Renewal Community. The designation enables the City to offer to its business owners and residents seeking employment opportunities the use of over \$17 million dollars in tax incentives.

To ensure that grant dollars are maximized and that programs become self-sustaining the City and its partners have committed to leveraging funds. The City of Charleston and its housing and community development partners understand the importance of leveraging private and federal dollars and work diligently to develop additional resources for programs. During the program year, more than **\$25,961,361.50** has been leveraged for housing, community development, and Renewal Community initiatives. The City is pleased with its ability to develop additional resources for the community in spite of challenging economic times.

Mayor Joseph P. Riley, Jr., is a visionary leader and avid supporter of affordable and workforce housing in the City of Charleston. In May of 2001, Mayor Riley and members of City Council set an ambitious goal of creating 3000 units of affordable housing by 2010 (including 1000 units of student housing). The goal, which was presented as a Resolution for City Council, challenged

the City and its partners to create affordable rental and homeownership opportunities. Attaining the goal is not without its challenges, but can be achieved through the continued dedication and commitment of each housing provider. To date, approximately **1432** homes have been created in the City of Charleston, with approximately **295** currently in production and **1,971** homes proposed. As noted above, the resolution also called for the College of Charleston to create 1000 units of dormitory-style housing. In 2002, the College of Charleston opened McAlister Hall, adding 530 beds of student housing. In the fall of 2007, the College opened two additional facilities: the George Street Apartments (250 beds) and the Liberty Street Residence Hall (400 beds). To date, the College has provided 1180 new student beds since 2001, which provides a total of **2,612** units.

The City of Charleston's Department of Housing and Community Development and partnering non-profit housing developers have made a commitment to develop homeownership and rental opportunities for low- to moderate-income working class families. A significant portion of the 2008-2009 CDBG and HOME funds were dedicated to the provision of affordable housing. During the program year, **151 units** of affordable housing were created or improved. Using HOPWA and other local resources, **32 households** received rental assistance, **608 households** received short-term rent, mortgage, or utility assistance and **896 persons** received assistance from Lowcountry AIDS and Ryan White assistance programs.

The City's most ambitious effort at providing affordable homeownership opportunities is known as the Homeownership Initiative (HI). This Initiative has three key goals: provision of affordable housing, revitalization of distressed neighborhoods, and enhancement of local non-profit organizations' capacity. Through this Initiative, the City acquired a stock of properties – both vacant lots and dilapidated housing – for transfer to non-profit housing developers. These properties are then developed into affordable for-sale housing, which is sold to first-time homebuyers who earn 120 percent or less of the area median income. The units are secured through 90-year deed restrictions which require resale to similar buyers at a price calculated to keep these units affordable for many years to come. The Initiative will create 128 units of affordable housing throughout Charleston's peninsula. To date, 52 houses have been completed under this program, and 49 have been sold to qualified buyers (six during this program year).

The availability of funding needed to create safe, decent and affordable housing is vital to the ongoing development of housing on the Peninsula and in other neighborhoods in the City. The Lowcountry Housing Trust (LHT, originally known as the Charleston Housing Trust) has been an additional funding source to housing providers constructing or rehabilitating affordable housing in Berkeley, Charleston, and Dorchester Counties. LHT provides very low-interest gap financing, predevelopment loans, and other financing to both homeownership and rental developments. LHT's mission is to serve as a regional advocate for affordable housing, to provide resources, reduce barriers, planning incentives; education and technical assistance to enable developers to produce affordable housing. They also provide nonprofit organizations subsidies for purchasing homes. LHT has continued to build its reputation as a resource for "making housing happen." In 2007, the Trust was designated as a Community Development Financial Institution (CDFI), which will help the Trust to secure additional funding in coming years.

The Renewal Community (RC) designation, awarded by HUD in January 2002, has proven as an excellent means to spur additional economic activity in the Neck and other areas of the Renewal Community. A package of tax incentives worth well over \$17 billion dollars encourages business to locate or expand operations in the RC and to hire RC residents. During the program year, approximately \$12 million in commercial revitalization deductions (CRDs) were awarded to six businesses. The incentives available through the Renewal Community designation include wage credits, tax deductions, and bond financing, among other incentives.

The 2008-2009 Consolidated Annual Performance and Evaluation Report includes the following information:

- A report on the progress made towards meeting strategies outlined in the approved Consolidated Plan including housing, community development, economic development, homeless/special needs and public housing plans;
- Accomplishments realized through the Renewal Community Initiative by the City and the Commercial Revitalization Deduction recipients;
- Actions taken to affirmatively further fair housing;
- Assessment of the grantee's efforts in carrying out the planned actions described in its action plan;
- Accomplishments attained by the City in leveraging its CDBG, HOME, HOPWA, Lead, Brownfields and Renewal Community resources;
- A self-evaluation of the City's progress in accomplishing the Consolidated Plan's goals and strategies.

Available Resources

For 33 years, the City of Charleston has used Community Development Block Grant (CDBG) funds to expand and maintain the supply of affordable housing, enhance community development, and promote economic development. For 16 years, the City has received HOME Investment Partnerships Program funds to assist in the creation and rehabilitation of both homeownership and rental opportunities. The City has also received Housing Opportunities for Persons with HIV/AIDS funding for six years. The City uses these resources, in addition to many others described below, to affect change in the lives of low- to moderate-income persons.

Community Development Block Grant (CDBG) Funds

The City of Charleston has been a CDBG entitlement community since 1975. In its 2008-2009 program year, the City was awarded **\$1,056,089** in CDBG funds. Additionally, the City projected receiving **\$400,000** in CDBG program income for the 2008-09 program year. Of the CDBG funds expended this year, more than 90 percent benefited low- to moderate-income persons. These funds are invested in the most economically challenged areas of the City, primarily focusing on the revitalization, rehabilitation, and rebuilding of neighborhoods located in the Renewal Community.

HOME Investment Partnerships Funds

The City of Charleston has also been a HOME participating jurisdiction since 1992. In its 2008-2009 program year, the City was allocated **\$826,621** in HOME funds. \$171,168 in matching funds was anticipated for the 08-09 program year. HOME funds are critical in developing both rental and homeownership units. Various non-profit and for-profit partners work with the City to rehabilitate and construct housing units to serve very low, low-, and moderate-income individuals and families throughout the City of Charleston.

HOME funds were used to support housing development in several communities throughout the target areas of the City of Charleston. On the peninsula, funds were used to support Charleston Area CDC's rehabilitation of 19-H, 1908 Doscher, 126 Poplar and 74 Maple Streets. In rural target areas Sea Island Habitat constructed three of four single family homes in the Brownswood Place neighborhood, a 53-unit single family neighborhood. The three homes were issued certificates of occupancy and the new homeowners were selected.

American Dream Down payment Initiative Funds

The City has fully disbursed its allocation of ADDI funds. The final recipient; a first-time homebuyer, purchased a home in the West Ashley community. The funding provided through the ADDI grant enabled ten households to achieve the dream of homeownership. ADDI funds are a special allocation of HOME Investment partnerships Program funds. Households benefiting from ADDI funds earn no more than eighty (80%) percent of the Area Median Income. The Charleston Bank Consortium is a non-profit Community Housing Development Organization chartered to provide financial assistance to first-time home buyers through loan products and home-buyer education.

Housing Opportunities for Persons with AIDS (HOPWA) Fund

The City of Charleston receives a direct allocation of Housing Opportunities for Persons with AIDS (HOPWA) funds from the Department of Housing and Urban Development (HUD). Funding awarded to the City of Charleston is used to provide housing and related services for qualified household living with HIV or AIDS (and their families) in Berkeley, Charleston, and Dorchester Counties. The City received **\$437,946** in HOPWA funds during the 2008-2009 program year. These funds have been awarded to Lowcountry AIDS Services (LAS) and Roper St. Francis Foundation, which provides housing assistance and a full range of supportive services to area residents living with HIV/AIDS and their families.

Special Economic Development Initiative (EDI) Funds

The City's obtained approximately \$1.125 million in two separate allocations of what is Special Economic Development Initiative funds. These awards support the Homeownership Initiative (HI) by (a) providing financial support to nonprofit partners for homebuyer education and credit counseling services, and (b) providing homebuyer subsidy to qualified first-time individuals and families, as well as other approved uses that support the Homeownership Initiative. These funds have been integral to the success of the City of Charleston's First-time Homeownership Initiative and have enabled the City to leverage additional funds in support of expanding affordable homeownership opportunities in the City. Both Special EDI grants expire in September 2009.

Enterprise Funds

The City continued to use its 1995 allocation of Enterprise Funds to support initiatives in the Enterprise (now Renewal) Community. During the program year, the City of North Charleston continued to utilize funding for rehabilitation of low- to moderate- income homeowner-occupied houses in the Union Heights and Accabee neighborhoods. A total of four (4) homes were completed under the City of North Charleston's Minor Repair Program during the period June 1, 2008 – May 31, 2009 for a total of \$12,685.38.

Renewal Community

Through its designation as a Renewal Community, the City of Charleston may allocate up to \$12 million in Commercial Revitalization Deductions (CRDs) each year through 2009. The CRDs are available to businesses starting, expanding, or relocating to the Renewal Community and implementing new construction to a building or significant reconstruction. The Renewal Community is comprised of 31 neighborhoods and spans both the City of Charleston and the City of North Charleston. There are also several other deductions and credits available under the Renewal Community Initiative. During the 2008-2009 program year, approximately **\$12,000,000** in economic incentives was awarded to eight (8) businesses. These incentives will help to create 111 jobs and to retain 26 jobs. (For more information, see "Commercial Revitalization Deduction Recipients" in the Appendix.)

Lead Hazard Control Grant

In April 2006, a three-year, \$3 million grant for lead hazard control was awarded to the City of Charleston by HUD's Office of Healthy Homes and Lead Hazard Control. The primary goals of the grant were to make 225 residential housing units lead-safe, provide lead poisoning awareness and education to the community, and train contractors in lead-safe work practices. During the program year, approximately \$842,046 was expended. A cumulative total of approximately 140+ units have been cleared of lead hazards, and substantial outreach and training have been provided. The remaining grant balance to date is approximately **\$800,575**.

The grant program has benchmarks to achieve in terms of numbers conducted per quarter in the following categories: lead hazard risk assessments, units completed and cleared of lead hazard, outreach/community events, and training in lead-safe work practices and EPA-certified programs

Enston Homes Funds

Enston Homes Funds are made available annually to area non-profit housing providers serving elderly persons forty-five years of age and older (defined by the Enston Home Trustees as persons aged 45 years or older). These funds are awarded through the Coalition on Homelessness and Affordable Housing, formerly, the Mayors Council on Homelessness and Affordable Housing and administered through the City of Charleston's Department of Housing and Community Development. During the 2008-2009 program year, \$15,030 was awarded to seven organizations.

Parcel A and B Funds

A few years ago, the City of Charleston acquired several large tracts of waterfront property. Some of the land was subsequently sold to developers and the proceeds resulted in the City's "Parcel A Funds," these funds have been set aside to support the development of affordable housing. The balance in the Parcel A Funds is approximately \$196,000.00.

Additionally, the City concluded the sale of another tract of land several years ago to a developer. The \$6 million proceeds have been referred to as "Parcel B Funds" and have also been reserved for affordable housing development.

Bridge Houses Fund

The City created a \$1 million revolving loan to assist in the renovation and redesign of several properties slated for sale under the City of Charleston's First Time Homeownership Initiative.

Nine single-family detached homes were donated to the City of Charleston by the South Carolina Department of Transportation (SCDOT) Mitigation Agreement. An additional six properties were purchased by the City of Charleston's Department of Housing and Community Development and were the more challenging properties to renovate. The Capital Project's Division of the City of Charleston's Parks Department developed a phased approach to accomplishing the task of renovation and reconstruction.

In Phase I, nine houses were relocated to the Eastside neighborhood. These homes have since been renovated and sold to first-time homebuyers under the City's Homeownership Initiative. Phase II involved the reconstruction and rehabilitation of three additional houses located in Charleston's Westside community that were also sold to first-time homebuyers. The properties in Phase III are larger, older, historic structures which are very costly to renovate. They are currently listed for sale with the expected proceeds targeted for affordable housing in targeted neighborhoods. Phase IV houses are located in a cul de sac in a developing section of the City. The City is currently seeking a private partnership for the development of that area. The current Fund balance is **\$791,000.00**.

Lowcountry Housing Trust

The City of Charleston was instrumental in establishing the Lowcountry Housing Trust, Inc. LHT received an award of \$25,000 in the 34th program year to develop a capital investment strategy to preserve and expand affordable housing funding sources in the City of Charleston and for administrative expenses related to the implementation of the Community Development Financial

Institution (CDFI). The Trust has had another successful year. Among their success: the continuation of the "Lunch and Learn" series, which was introduced two years ago and has proven to be successful in networking and marketing the Trust, as well as the continued circulation of the Affordable Housing Development Handbook which is circulated to developers in hard copy and PDF form. LHT was awarded its Community Development Financial Institution (CDFI) certification in April 2007. Currently they are seeking to hire a Loan Officer to develop new loan products and perform other lending related duties related to the CDFI. This is their 4th year receiving funds from the City of Charleston.

The Housing Authority of the City of Charleston

The Housing Authority of the City of Charleston owns 1399 public housing units and manages an additional 940 units of low and moderate income housing. The Housing Authority will receive **\$5.7 million** in operating funds from HUD during fiscal year 2008. Additionally, the Housing Authority will administer more than **\$6.8 million** in Section 8 Rental Assistance funds, helping approximately 1317 low and moderate-income persons to meet the challenge of obtaining housing in Charleston.

The Authority secured an allocation of 72 Housing Choice Vouchers (HCV) to support the partnership with the Veterans Affairs department. Thirty four are currently under contract.

In March 2009, the Authority received \$3,071,883.00 Capital Grant under the American Recovery and Reinvestment Act to extend the useful life of Public Housing. As of May 31, 2009 nine contracts had been awarded, obligating 61% of the allocated funds. Projects ranged from: Reroofing, Painting, Carpentry, Landscaping. The investment also generated over 100 construction jobs.

Low Income Housing Tax Credit (LIHTC) Program

During the program year, three organizations submitted requests to the S.C. Housing Finance and Development Authority for four prospective developments in the City of Charleston. The organizations included the Humanities Foundation, James Doran Company and Hampstead Partners, L.L.C. Two of the four applications that were submitted were awarded tax credits. In the coming year, additional information will be provided regarding those developments.

McKinney Vento Act Funding

The City of Charleston is included in the Lowcountry Continuum of Care Partnership, which serves seven of South Carolina's coastal counties. This year, the Continuum used **\$336,995** for a total of new 6 projects. Leveraging amounts added another **\$787,815** to the value of these activities, and required matching funds equaled **\$462,509**. The resulting total value of housing and services provided through the Continuum from this grant alone was **\$1,587,319**.

Brownfields Petroleum Grant

The City was awarded a petroleum site clean-up grant from U.S. Environmental Protection Agency(EPA) in the amount of \$200,000 and has completed its utilization of the funds. Among, other sites, the City of Charleston conducted an assessment of the 500 Block of Meeting Street in the Bridge Redevelopment Area. This area of the Eastside Community is slated for a mixed-use development. To date, EPA has awarded the City of Charleston approximately \$2m to enhance its efforts concerning environmental remediation and site clean up.

Summary

During this program year, many sources of funding, including a majority of the City's CDBG and HOME funds, were allocated to services, projects, and programs that address affordable housing needs. With the current economic climate among other factors, the need for both affordable homeownership and rental opportunities are in high demand. Through the combination of these funds and the extensive leveraging ability of non-profit organizations and public/private partnerships, the City has been able to maximize the diminishing federal funds to continue providing affordable housing and community and economic development opportunities for low- to moderate-income families and individuals.

Housing

The City of Charleston has been proactive in addressing housing issues using Community Development Block Grants, HOME Investment Partnerships Program funds, and other federal commitments to work toward the revitalization of the City's neighborhoods and the provision of affordable housing. Affordable housing remains a challenge in Charleston. With a 2008 Area Median Income of \$60,300 for a family of four and an average home price of over \$250,000 many are finding it increasingly difficult to afford to live in the City of Charleston. Purchasing a house is out of the reach of most low- to moderate-income persons, and those who are fortunate enough to own their homes often find home maintenance and repair costs difficult to meet. Rental units in economically depressed areas suffer the same effects of delayed maintenance, often leaving renters to live in substandard units. The City continues to partner with community members to address housing concerns.

The City of Charleston's Department of Housing and Community Development and partnering non-profit housing developers have made a commitment to develop homeownership and rental opportunities for low- to moderate-income families. During the program year, **6 homes** were sold to first-time homebuyers and **2 rental apartments** were completed. Also, **34 homes** were rehabilitated, and **26 households** received tenant-based rental assistance. Another **348 households** received short-term rent, mortgage, or utility assistance through City-funded programs, and an additional **255 households** received emergency assistance through the ShelterNet Program. Specific accomplishments are discussed in this section.

Homeownership Opportunities

Homeownership Initiative

The City of Charleston Homeownership Initiative was established in December 2000 with the following goals (1) provide housing that is affordable to persons of low and moderate incomes, (2) revitalize some of the City's more distressed neighborhoods, and (3) build capacity among the local non-profit organizations to develop affordable housing.

To accomplish the goals of the program, the City acquired approximately 100+ properties in five neighborhoods that were considered distressed and in need of revitalization. The properties were subsequently transferred to six nonprofit developers for either new construction or rehabilitation. The houses are sold to first-time homebuyers earning up to 120 percent of the area median income.

This year has been extremely challenging for the City and its affordable housing partners. The economic upheaval that is sweeping the nation has left its impact in Charleston and although home prices remained steady, sales dropped dramatically in all income strata. The ever-changing credit policies have resulted in decreased lending to both developers and homebuyers. Demand for affordable housing remains at the expected high but securing qualified buyers has become a greater challenge. Our partners are working creatively to bring existing projects to fruition.

A total of 6 homes were sold during the program year. The long-awaited Cottages of Longborough, a 42-home condominium development, was completed in March 2009 bringing the total number of homes developed this year to 45. Cumulatively, the Homeownership Initiative has produced 93 homes of affordable housing on Charleston's Peninsula. An additional 10 homes are underway with an anticipated completion time of 4th quarter 2010.

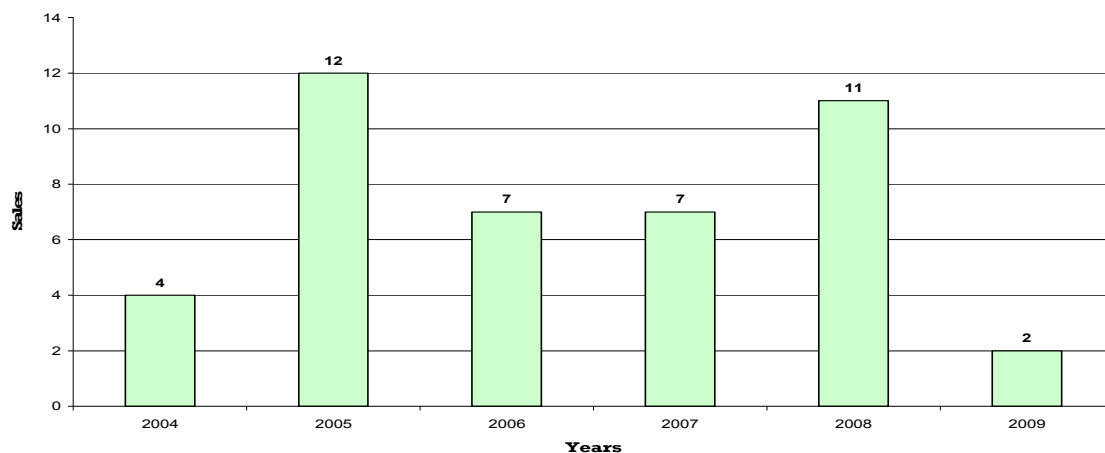
Homeownership Initiative Developments Cottages at Longborough



Given the current economic climate, it is predicted that sales will be slower due to the financial challenges of the targeted borrowers. Despite these setbacks, the City of Charleston is confident that its goal of 127 units of affordable housing are attainable. The economic impact of the activities associated with the Homeownership Initiative is approximately \$35 million.

The chart below illustrates the yearly sales of homeownership units.

**Homeownership Initiative Production Report
2004 - 2009**



Other Homeownership Opportunities

Sea Island Habitat for Humanity constructed four additional homes towards the completion of a three-phased development, whereby, fifty-six (56) homes are being constructed for low and moderate income persons in Brownswood Place on Johns Island. To date, the City has provided financial assistance for the construction of eight (8) homes. In future builds, Sea Island Habitat is utilizing the Earthcraft building standards for homes being constructed.

Brownswood Place Phase 3



Homeownership Education and Counseling

House and Home Program

The City of Charleston awarded **\$25,000** (CDBG) and **\$40,000** (Special EDI II) in contracts to the Charleston Trident Urban League's House and Home Program and Homeownership Initiative Program Implementation. The League serves individuals in the City of Charleston and throughout the Tri-County area. The House and Home program provides homeownership education counseling workshops and individual consumer credits counseling for first time homebuyers and residents who currently own their homes. Many mortgage lenders require their clients to participate in these classes to ensure they have credit counseling and pre-homeownership training before they can purchase a home.

During the program year 11 classes were held and 47 participants graduated. Of the graduates there were 35 prospective homebuyers. Through another component of the House and Home program the League provided 104 persons with one-on-one counseling. The counseling included debt management, pre-rehab financing, pre-purchase and post-purchase information.

Financial Literacy Training

The Charleston Area CDC offers a 13 to 15 week financial literacy training class. The training consists of financial literacy and credit review, followed by homebuyer education. During the program year, approximately 80 people have completed the training. Due to the knowledge of the financial literacy, the CDC has a waiting list that consists of 100 residents.

Homeowner-Occupied Housing Rehabilitation

Roof Replacement Program

The City of Charleston offers a Roof Replacement Program, under the oversight of the Redevelopment and Preservation Commission (RPC). To avoid triggering the costly lead paint abatement requirements, but still serve lower-income homeowners who are not candidates for substantial rehabilitation, the City began the Roof Replacement Program. This program targets households at or below 60 percent of the area median income located anywhere in the City of Charleston. Roof replacements cost between \$6,000.00 and \$14,000.00, averaging \$10,175.00. During the program year, 34 homeowners received new roofs, including 16 elderly homeowners.

Roof Replacement Project



Before

After

1110 King Street

Substantial Rehabilitation Program

The Substantial Rehabilitation Program requires homeowners to contribute a minimum percentage of the cost of the rehabilitation from private funds, and the City will provide the remainder, either in the form of a fully amortizing loan or as a deferred, forgivable loan. The Substantial Rehab program provides total renovation of the projects undertaken. All components of the houses are addressed during the renovation process including the structural soundness of the project. The program utilizes a pool of architects to provide drawings for the projects and a pool of qualified contractors are allowed to bid on construction. The program also plans to provide homeowners with a 2-10 year Remodelers's Warranty upon completion of the work which warranties the structural components of the renovation work for 10 years. During the 2008-2009 program year no substantial rehab projects were completed. A project located at 623 Rutledge Avenue was near completion at the end of the program year.

Minor Repair Program/LEAD Hazard Control Program

The City is currently offering a Minor Repair Program for repair work done in conjunction with the City's Lead Hazard Control Grant Program. During the program year, **\$209,889** was spent to assist nineteen (19) homeowners with minor repairs that were necessary to correct the lead problems in their homes. The Minor Repair/ Lead Hazard Program is designed specifically for owner occupied residents who have Lead hazards in the home and only minor repair work is

required to make the house Lead safe. Lead hazard control funds that were leveraged with the nineteen minor repairs completed in 2009 totaled \$235,905.00

Paint and Repair Program

Charleston Outreach, an independent 501(c)(3) organization, has its beginnings in the Charleston Baptist Association. Charleston Outreach assists the City of Charleston in its rehabilitation efforts with single-story, single-family detached homes. Charleston Outreach provides painting and minor repair to houses identified by the City, which coordinates application intake and eligibility verification and provides technical assistance to the organization as needed. During the program year, Charleston Outreach assisted seventeen (17) homeowners with painting and minor repairs.

Lead Hazard Control Program

In 2006, the City was awarded a three-year HUD-funded grant focusing on the identification and remediation of lead-based paint hazards in neighborhoods on the Charleston peninsula and West of the Ashley. Using interim control methods of paint stabilization, window and door replacement or renovation, and mulching or paving over soils found to have high lead levels, the goal of the program has been modified to make 145 residential housing units lead-safe, to protect children under the age of six and pregnant women. Other goals of the Lead Hazard Control Program are to educate the community about lead-based paint hazards, and to build a capacity of local contractors with specific training in lead-safe work practices. During the program year the program cleared 72 homes of lead paint hazards. The program will continue as a result of a \$3 million grant awarded to the City of Charleston through the American Recovery and Reinvestment Act (ARRA) of 2009.

Lead Hazard Control Project



Before



After

1 Rosedale Street

Charleston/North Charleston Renewal Community Revitalization

The City of Charleston, in partnership with the City of North Charleston, has implemented a minor home repair and renovation program in two neighborhoods located in Charleston's Renewal Community; Accabee and Union Heights. This program is funded with Enterprise funds and is being conducted by Charleston Outreach. The Greater Charleston Empowerment Corporation and the Union Heights and Accabee Neighborhood Associations are assisting with outreach.

The program seeks to revitalize those communities by improving the appearance of residents' homes. Funds are used to address the minor repair of 52 homes in the designated communities. The City of North Charleston's Community Development division assists in contract management and the coordination of application intake for residents interested in the

program. A total of four (4) projects were completed under the City of North Charleston's Minor Repair Program during the period June 1, 2008 – May 31, 2009 for a total of \$12,685.38.

Rental Housing

Rental Rehabilitation Program

The Rental Rehabilitation Program provides owners of rental properties a subsidy of \$10,000 per home in the form of a deferred forgivable loan to assist with the cost of rehabilitation. In return, the owners are bound to a 20-year affordability period and agree to rent to households that qualify under HUD rental programs. Property owners may also receive lead grant funds through the City's Lead Hazard Control Program, if a child under the age of six or a pregnant woman resides in the rental home. Two rental developments were completed during the program year; 9 Dewey and 204 Fishburne Streets. The funds leveraged to bring this redevelopment to fruition included: \$17,982.50 in Lead funds, \$20,000 in HOME funds and \$82,302 in private funds. Both projects were single unit developments.

P.A.S.T.O.R.S Rental Properties

P.A.S.T.O.R.S., Inc. was awarded \$40,000 in 2007-2008 HOME funds to develop rental units. They have rented two of the nine rental units that are being developed. 33 America and 1 Sheppard Street are completed. 33 America is a vacant property and is being marketed by the Space Company and 1 Sheppard Street is being rented by the City of Charleston Police Department. Predevelopment is completed at 69 America which is being developed as two triplexes. It is anticipated that the additional two units at 14 Drews Court will be constructed.

Canterbury House

The Canterbury House is a HUD-funded senior development in the City of Charleston. The Enston Home Endowment provides a rental subsidy to Canterbury House residents who have the greatest need and receive no other assistance. This year, five residents each received a \$50 rent credit monthly for twelve months, which reduces their rent payment.

Lowcountry AIDS Services

Lowcountry AIDS Services offers a tenant-based rental assistance (TBRA) program using Housing Opportunities for Persons with AIDS (HOPWA) funds. This program is administered by the Fort Mill Housing Authority. During the program year, 24 households were assisted through this program.

Roper Saint Francis Foundation

Roper Saint Francis Foundation also assisted 3 persons with tenant-based rental assistance (TBRA) program using Housing Opportunities for Persons with AIDS (HOPWA) funds.

Other Housing Initiatives Supported by the City of Charleston

Coalition on Homelessness and Affordable Housing (Formerly Mayor's Council on Homelessness and Affordable Housing)

The Coalition on Homelessness and Affordable Housing (Coalition) is a group of nonprofit organizations from all sectors who are concerned about housing and homelessness in the greater Charleston community. The Council has more than a decade of advocacy and action behind it. The Council's mission is two-fold: "To ensure safe, decent, affordable housing and services for homeless and at-risk citizens of Charleston; and to ensure the services they need are available so that they might achieve their potential."

The Coalition meets bimonthly to discuss issues of interest to housing and homelessness service providers. The Council is guided by a Steering Committee which meets in the off months to discuss agendas and issues in the community. Also, the Policy Committee has been particularly active in contacting State legislators and briefing the Council on policy issues. Future goals include holding local forums on affordable housing and homeless issues, expanding membership among organizations and jurisdictions located in Charleston County, and continuing to pursue regulatory changes both at the local and the state level.

The Coalition serves an important function in the Charleston community. It is a venue for service providers to share information about funding sources, challenges encountered, and pending legislative changes. It provides a forum for various service providers to learn about the community and to network with others to further the concept of a "continuum of care," linking service providers with housing providers. The Coalition also enjoys a close relationship with the Lowcountry Continuum of Care Partnership, with which the Council holds an annual joint meeting to explore linkages between housing and homelessness challenges and resources. During the program year, the Coalition did not meet on a regular basis, but will conduct a joint meeting with the Continuum in October 2009 and work to secure a new Chairperson for the ongoing work of the Coalition and the community.

Beneficiaries

Overall, 862 households benefited from housing funding provided by the City of Charleston this program year. Six houses were sold to qualified buyers, placing approximately 11 family members in safe, decent, and affordable housing. Thirty-four homes were provided rehabilitation assistance, ensuring that 89 City of Charleston residents are in safer, more attractive housing. The City also provided funding for the painting and minor repair of 117 homes housing over 170 people in the City of Charleston and North Charleston section of the Renewal Community. Fifty-eight (58) senior households were assisted during the program year. (For more information, refer to Beneficiary Chart in the Appendix of this document.) Over 600 households including persons living with HIV/AIDS received some form of mortgage, rent or utility assistance. (For more information, refer to "Housing Opportunities for Persons with AIDS (HOPWA) – Consolidated Annual Performance and Evaluation Report – Measuring Project Performance" in the Appendix of this document)

Evaluation of Progress

Cool Blow/ Ponderosa/Francis Street

The Department of Housing and Community Development continues to pursue the goals outlined in the City's 2005-2010 Consolidated Plan and the objectives of the City's 2008-2009 Annual Acton Plan, while continuing to strive to meet the City Council's long-range goal to develop 3,000 new units by the year 2010, which includes 1000 student housing units. Since that time, the College of Charleston has constructed McAlister Hall (530 beds), the George Street Apartments (250 beds), and the Liberty Street Residence Hall (400 beds), which relieves some of the pressure on the City's affordable housing stock. To date, approximately **1432** homes have been created in the City of Charleston, with approximately **295** currently in production and **1,971** homes proposed. With Mayor Riley's continued leadership, City Council's guidance, the U.S. Department of Housing and Urban Development's continued partnership, and the community's involvement, the City will continue to strive to meet this goal.

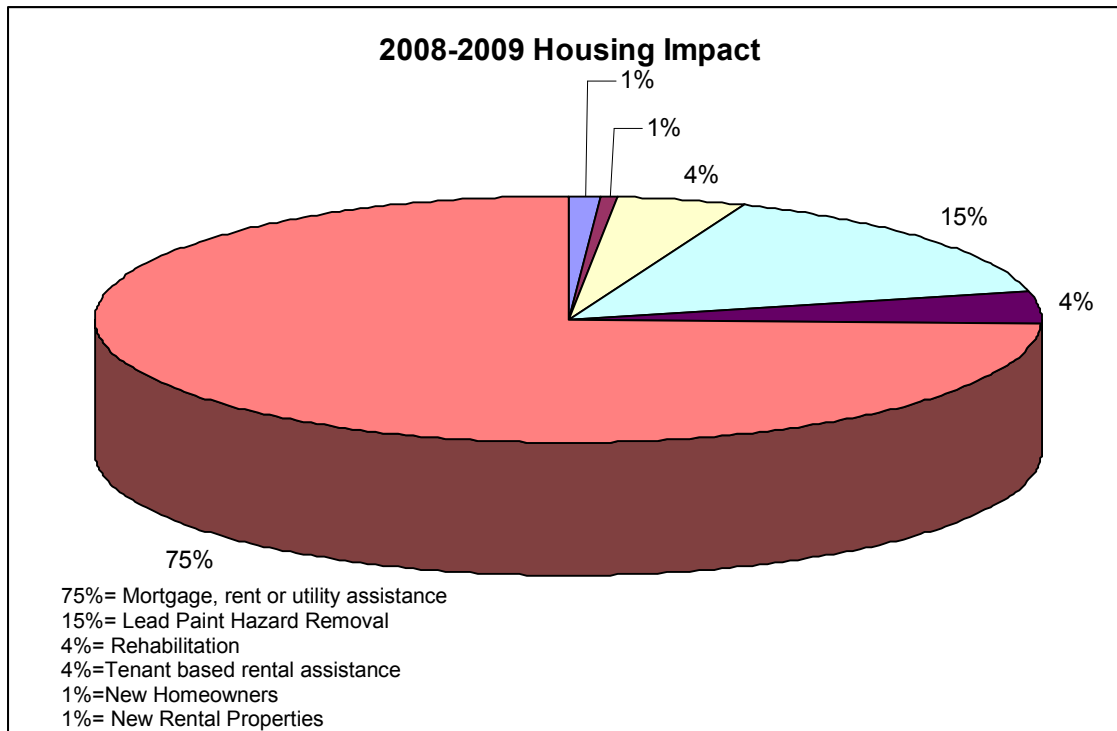
The creation and implementation of the Mixed-Use Workforce Housing Ordinance, as well as, the affordable housing percentage requirements in Planned Unit Developments has increased rental and ownership development opportunities in the City of Charleston. These homes target persons earning 80% to 120% of the Area median Income (AMI). Although, these homes are not affordable to all segments of the population, opportunities exist for those residents who are considered a part of the workforce housing income limits. Developments that are planned that focus on residents in this income category include; Ponderosa (rental) and Francis Street (homeownership) *The One Cool Blow Street development include eight (8) workforce ownership opportunities. Five homes are sold, two are under contract and one is available for sale.* Other future mixed-income, mixed-use developments include Long Savannah and the Angel Oak Planned Unit development

The City of Charleston has also experienced an increase in the number of cases processed and requests for rehabilitation funds. Activities have increased substantially over the last two years both for owner-occupied rehabilitation and rental rehabilitation.

CDBG and HOME funds have served as the seed money for many projects sponsored by the City and its non-profit housing developers. These funds are leveraged with funding from financial institutions, state and federal agencies, and private and public foundations. Building on strong partnerships, our community has been able to leverage additional funding to promote housing development and expanded services for persons with special needs.

During the program year, the City was successful in the rehabilitation or repair of **151 units** in the City, in addition **32 households** received tenant-based rental assistance, another **313**

households received short-term rent, mortgage, or utility assistance through City-funded programs, and an additional **255 households** received emergency assistance through the ShelterNet Program. The City of Charleston continues to work closely with its partners to bridge the continued gap between housing availability and affordability. The City is working to revitalize blighted areas, maintain racial and economic diversity, and ensure that affordable housing continues to exist on Charleston's peninsula and in other neighborhoods in the City of Charleston.



As illustrated in the chart above, the City of Charleston impacted 862 households through homeownership opportunities, rental homes, owner-occupied rehabilitation, lead paint hazard removal and tenant-based rental assistance during the 2008-2009 program year. This is an impressive number; however, the City of Charleston is always striving to increase production and the City is anticipating a productive 2009-2010 program year. In 2009 Rehabilitation cases are also expected to increase with the expansion of marketing efforts.

American Reinvestment and Recovery Act

The American Recovery and Reinvestment Act (ARRA) enacted by the Congress of the United States under the presidency of Barack Obama is playing a pivotal role in the provision of both programs and services rendered to persons of low and moderate incomes. Under the ARRA, the City of Charleston has obtained a Lead Grant in the amount of \$3m. The Lead Grant will enable the City of Charleston to assist residents with the rehabilitation of their homes through the remediation of lead poison through interim control construction methods. The City of Charleston also received a grant in the amount of \$286, 702 in CDBG-R funds. These funds will be leveraged by \$5,000,000 in general funds to build the City of Charleston's first LEED-Certified building in one of the Renewal Community neighborhoods of the City of Charleston.

Homeless Prevention and Rapid Rehousing Program (HPRP)

An additional source of funds granted through the American Recovery and Reinvestment Act is Homeless Prevention and Rapid Rehousing Funds (HPRP). Both the State of South Carolina through the Governor's Office of Economic Opportunity and the County of Charleston through its Community Development Office were awarded HPRP funding. The purpose of the HPRP is to provide homeless prevention assistance to low income households who would otherwise become homeless and to rapidly re-house individuals and families who are currently homeless as defined by section 103 of the McKinney-Vento Homeless Assistance Act. The County of Charleston has not announced awards under the HPRP Program at this time. Three organizations were fortunate to obtain an award from the State of South Carolina; Family Services Incorporated, Crisis Ministries and Humanities Foundation; a description of their programs is detailed below:

Family Services, Inc. has been awarded a three year grant in the amount of \$300,000 to provide counseling services and direct payment to vendors for rental assistance, security deposits, utility deposits, utility payments, moving cost assistance and motel vouchers. Our HPRP program design utilizes our successful Lease on Life, Representative Payee, and Financial Literacy Education as service models. The goal is to achieve stable permanent rental housing for homeless and at risk families and individuals. Both models have proven track records and demonstrate that Family Services, Inc. has the experience and capacity to provide financial assistance, budgeting, financial literacy education, and housing relocation and stabilization services.

We anticipate demand for our services will be heavily weighted towards Homeless Prevention applicants because the Rapid Re-housing population will have access to services from Crisis Ministries, and, to a limited degree, our Lease on Life rental assistance program. Applications will be heavily screened prior to scheduling an intake interview. All applicants will be required to provide ongoing income and at-risk documentation to qualify for the program.

Annually, with HPRP funding, we hope to serve a minimum of 16 to 17 families and 50 members of families for a total of 50 families and 150 members of tri-county families during the 3 year grant period. We hope to keep 35 families and 105 individuals from becoming homeless. We hope to move 15 families and 45 individuals from homelessness into homes.

Crisis Ministries' Homeless Prevention and Rapid Rehousing Program provides financial assistance including short-and medium-term rental assistance and utility deposits and payments. Housing relocation and stabilization services include case management, outreach and engagement, housing search and placement and legal services. All of these services are available to those currently living at Crisis Ministries, as well as former clients who are in need of assistance in order to maintain community-based housing.

Humanities Foundation, Homeless Prevention Rapid Rehousing ShelterNet Program will target communities throughout the Tri-County area. We have received an award of \$400,000 from the State, which will serve 45 households and anticipate receiving \$100,000 from Charleston County, which will serve 12 households. Both programs have a duration of three years. The services will be focused primarily on homelessness prevention through financial assistance. We will be following the HUD program requirements of targeting households with the highest risk of homelessness using the HPRP risk criteria. Eligible households must have incomes at or below 50% of the Area Median Income and be willing to participate in a service plan and quarterly re-certifications for continued assistance. The financial assistance we provide will target rent and utilities both arrears and current payments as needed.

Humanities Foundation will be hiring one new full-time staff member who will coordinate the program by marketing the program to other frontline community groups who will be providing referrals for persons who require assistance. A new referral form has been created and will be distributed to groups through a planned community training that will provide information on the HPRP program policies and procedures, screening for homelessness risk criteria, types of assistance and program reporting. Our program coordinator will work directly with referring agencies to ensure that eligible households receive needed services and follow-up in order to reach the goal of financial self-sufficiency.

Neighborhood Stabilization Program

Title III of Division B of the Housing and Economic Recovery Act, 2008 (HERA) appropriated \$3.92 billion for emergency assistance for redevelopment of abandoned and foreclosed homes and residential properties, and provided under a rule of construction that, unless HERA states otherwise, the grants are to be considered Community Development Block Grant funds. The grant program under Title III is commonly referred to as the Neighborhood Stabilization Program (NSP).

The Housing and Economic Recovery Act of 2008 required that States must “give priority emphasis and consideration to those metropolitan areas, metropolitan cities, urban areas, rural areas, low- and moderate-income areas, and other areas with the greatest needs. Congress intended this funding be targeted to areas of greatest need based on the number and percent of foreclosures, subprime mortgages, delinquencies and defaults. Further, Congress also required that each state receive at least \$19.6 million. Many states received significantly more than this mandatory minimum.

All communities will have access to grants, but Congress was very clear that the purpose of this funding was to target those areas with the greatest exposure to foreclosures, subprime mortgages, delinquencies and defaults. At Congress’s direction, we believe we have developed a fair and data-driven formula that will do exactly that. We also wanted to make certain that this funding will have a meaningful impact at the State and local level.

The State of South Carolina received \$46m in NSP funds. On Wednesday, March 25, 2009 the South Carolina State Housing Finance and Development Authority (SCSHFDA) announced the award of \$44M in Neighborhood Stabilization Program Funding to 17 organizations across the State of South Carolina. The Lowcountry Housing Trust was awarded \$7.4M for properties in Berkeley, Charleston, and Dorchester counties. The City of Charleston received \$1,634,830.

The categories for funding are as follows:

1. Acquisition/Rehabilitation.
2. Downpayment /Closing Costs
3. Demolition/Redevelopment of for-sale housing up to 120%.Demolition/Redevelopment of rental housing above 50%.
4. Rental housing below 50%.

The City of Charleston targeted properties located in the St. Phillip/Fishburne Street corridor. The reconstruction/redesign of the properties will provide both homeownership and rental options; homeownership will serve persons earning up to one hundred and twenty (120%) percent of the Area Median Income; the rental homes will target persons earning no more than eighty percent (80%) of the Area Median Income. The City will seek to leverage the funding provided by the NSP grant with private funding, as well as, both Community Development Block Grant and Home Investment Partnership Program funds.

Relocation

The City of Charleston works to ensure that citizens are not displaced from their residences, either permanently or temporarily. Yet, at times, environmental circumstances or unsafe conditions may make it necessary for households to move from their homes. In these cases, the City follows its defined relocation guidelines established as part of the Redevelopment and Preservation Program. The City ensures that the owner or renter is moved to a comparable, comfortable residence for as short a period of time as possible. Households are relocated to ensure their safety and to allow construction crews to work in an efficient and effective time frame. During the program year, the City relocated an elderly woman who lives at 623 Rutledge Avenue because a substantial rehabilitation was being performed on her home. The redevelopment was still underway at the close of the program year.

Public Housing

The City of Charleston's Department of Housing and Community Development collaborates with the Housing Authority of the City of Charleston to address affordable housing. The Housing Authority's goal is to promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination. The goals of the Authority are as follows:

- Increase the availability of decent, safe and affordable housing
- Improve the quality of assisted housing through the following:
 - Increased customer satisfaction.
 - Improved public housing management.
 - Renovation and modernization of public housing units.
- Improve community quality of life and economic vitality.
- Promote self-sufficiency and asset development of families and individuals.

The Housing Authority of the City of Charleston (CHA) works to increase housing options and ensure that affordable units are available to local residents. CHA increases the available housing stock through both new construction and rehabilitation projects. The Authority has also taken great initiative to ensure the units that are a part of the current public housing stock are maintained to a manner that provides residents with safe, decent, and affordable units.

As an independent organization, CHA is governed by its own Board of Commissioners and collaborates with other local government agencies in providing decent affordable housing. The Authority works closely with the City of Charleston's Department of Housing and Community Development in the development of new housing units. CHA has a lending arm that has been active in providing financing to several non-profit organizations participating in the City's Homeownership Initiative. The Housing Authority has been instrumental in providing such financing and support to the Episcopal Diocese CHDO for the development of Porter's and Humphrey's Courts. The Humanities Foundation and P.A.S.T.O.R.S. have also received similar funding.

The Housing Authority manages 1399 public housing units in 11 developments as well as 169 units which are scattered throughout the City. Each year the Authority renovates its public housing stock utilizing a capital fund grant made available to the Authority. This ensures that the units are kept well-maintained and viable as continued public housing stock. CHA's occupancy levels remain high, and there are 778 families currently on the waiting list which is now open. CHA is able to fund approximately 1317 Section 8 vouchers; currently, the waiting list has 1008 families on it and is closed. The CHA is a high performer under HUD's Public Housing Assistance Program, which indicates that the Authority maintains quality rated administration, maintenance, resident support, and program management for its residents.

Homelessness and Special Needs

The City of Charleston, in partnership with area non-profits, is focusing its efforts on eliminating chronic homelessness by supporting interrelated programs that help individuals and families reach self-sufficiency. Increased integrated services, expanded housing opportunities (specifically transitional and supportive housing), and increased economic opportunities for low-to moderate-skilled employees are a focus for the Charleston area. Through collaborative efforts, many organizations were able to enhance their capacity to meet the growing need for services targeted to the homeless and those with special needs.

Homeless Persons and Homelessness Prevention

Lowcountry Continuum of Care Partnership

The Lowcountry Continuum of Care Partnership (LCOC) is a coalition of homeless shelter, housing, and service providers as well as other groups or individuals with an interest in homelessness. Its mission is to plan, develop, and implement coordinated strategies to address homelessness. The partnership was created to maximize the resources available to homeless persons in Beaufort, Berkeley, Charleston, Colleton, Dorchester, Hampton, and Jasper Counties through the planning and coordination of a quality and comprehensive continuum of care system.

Continuum partners' services include housing assistance, training and employment opportunities, health care, childcare, emergency financial assistance, and/or transportation assistance. The Lowcountry Continuum of Care's goal is to build a system of non-redundant services that takes advantage of the community's greatest assets.

Since its inception in 1995, the Continuum has brought in more than \$12 million to support various homeless programs. When leveraging and matching dollars are considered, the total value of these services is over \$20 million. Greater than 95% of these activities have benefitted the City of Charleston.

During the 2008-2009 HUD Continuum of Care funding round, the Lowcountry Continuum of Care Partnership was granted **\$336,995** for a total of 6 projects at 3 agencies. Although their request was for both renewal and new projects, only the new projects were funded. LCOC missed being fully funded for this very competitive application by only 1.25 points, and less than 2% of new projects nationwide were funded.

More than 145 homeless persons will be assisted by these projects. Leveraging amounts added another **\$787,815** to the value of these activities, and required matching funds equaled **\$462,509**. **The resulting total value of housing and services provided through the Continuum from this grant alone was \$1,587,319.**

The following programs received funding from this grant:

Agency	Funded Project	Amount Received	Project Type
Florence Crittenton Programs of SC	Nunan Street	\$49,946	TH
Crisis Ministries	Street and Rural Outreach	\$71,598	SSO
Crisis Ministries	Homeless Management Information System	\$45,765	HMIS
Crisis Ministries	Self-Sufficiency (includes \$11,869 for additional HMIS expenses)	\$73,336	SSO
Housing Authority of the City of Charleston	Enston Village Supportive Housing	\$29,754	PSH/TH
Housing Authority of the City of Charleston	Project 88	\$66,596	TH

PSH=Permanent Supportive Housing

CH=Chronically Homeless

TH=Transitional Housing

SSO=Support Services Only

HMIS=Homeless Management Information System

Presently funded projects include:

- Crisis Ministries' Street and Rural Outreach – \$71,598 for supportive services
- Crisis Ministries' Transitional Housing for Chronically Homeless Women - \$155,505 for transitional housing
- Crisis Ministries' Transitional Housing for Chronically Homeless Families – \$202,272 for transitional housing
- Crisis Ministries' (HMIS) Homeless Management Information System – \$45,765 for HMIS
- Crisis Ministries' Self-Sufficiency (includes \$11,869 for additional HMIS expenses) – \$73,336 for supportive services
- Crisis Ministries' Case Management – \$63,000 for supportive services
- City of Charleston Housing Authority's Enston Village Supportive Housing – \$29,754 for transitional and permanent housing
- City of Charleston Housing Authority's Project 88 – \$66,596 for transitional housing
- Florence Crittenton Programs of SC's Nunan Street Project – \$49,946 for transitional housing
- Family Services, Inc.'s Lease on Life – \$286,144 for permanent supportive housing for chronically homeless persons
- Carolina Youth Development Center's Bakker Career Center – \$237,589 for supportive services
- The ACCESS Network, Inc.'s Permanent Housing for the Chronically Homeless in Beaufort, Colleton, Hampton and Jasper Counties – \$104,181 for permanent supportive housing
- The ACCESS Network, Inc.'s Permanent Housing for the Homeless in Beaufort, Colleton, Hampton and Jasper Counties – \$200,152 for permanent supportive housing
- Charleston County Human Services Commission's New Promise Permanent Housing – \$151,827 for permanent supportive housing for chronically homeless persons
- Charleston County Human Services Commission's Road to Stability- \$104,053 for transitional housing

The Continuum makes available to providers the Homeless Management Information System (HMIS), which is designed to track clients and services. HMIS yields concrete data for agency and community reporting, and it also allows for effective program planning. In addition, the Continuum conducts research through the biennial Point in Time Homeless Count. Results from the 2009 Count are expected to be released by September, 2009.

The Continuum is planning to submit its HUD 2009-10 Continuum of Care grant application, requesting more than \$1.5 million. LCOC is working to ensure that this application will score high enough to be awarded full funding; although they have been informed that this year's process will be more competitive than ever, with only 1% of the total amount nationwide being available for new projects.

The City of Charleston was instrumental in the formation of the Lowcountry Continuum of Care and continues its collaboration by participating in meetings and planning. A representative from the City serves on LCOC's Expansion Committee. The City of Charleston will continue to work with the Continuum of Care to ensure that the full complement of services and housing are available to this vulnerable population.

Crisis Ministries

Crisis Ministries, the largest shelter provider in South Carolina, is an independent non-profit organization that has provided services and shelter to homeless citizens including individuals and families. The overall mission of the organization is to provide food, shelter and hope to prevent homelessness, one family/person at a time. Their clients typically come from a variety of circumstances and include veterans, former convicts, and victims of domestic violence. Clients are often challenged by chronic health conditions, mental illnesses, alcohol and drug addictions, illiteracy and a lack of education and job skills. Over the past year, the organization has operated a family center, men's shelter, soup kitchen, food rescue program and clinical services center.

The City awarded Crisis Ministries \$15,000 in 2008-2009 CDBG funds for the Up and Out program. Through the Up and Out program, they have served 84 persons including individuals, families and women and children, assisting them in becoming self-sufficient to live on their own and find housing, employment, childcare, and receive medical care. The City of Charleston is the only source of funding for this valuable, and successful, program. The ultimate goal of this program is to assist individuals and families to become successfully self-sufficient, with their last resort being to return to the shelter.

Transitional Living Center

The Charleston Bank Consortium completed the development of the Transitional Living Center (TLC) in May of 2008. The project is located at 18 E Street, approximately a block away from Crisis Ministries' shelter at 573 Meeting Street. The TLC serves as transitional housing serving eight to ten women with children as they move from the Crisis Ministries to permanent housing. The Center was funded through **\$114,538** in City HOME funding and **\$218,500** from the South Carolina Housing Trust Fund. The property has been donated to the Crisis Ministries on behalf of the Charleston Bank Consortium, City of Charleston and SC State Housing Finance and Development Authority.



The Transitional Living Center

ShelterNet

Through the ShelterNet program, the Humanities Foundation provides much-needed emergency assistance to low-income families and individuals who are having difficulty paying rent, utility bills, or other related expenses that ensure they have a decent, safe place to live. This program helps families living in Charleston, Berkeley, and Dorchester Counties. During the program year 255 households were provided assistance. Of the 255 households that were provided assistance, 19 had a head of household who were elderly. It is also noted that the demographic of clients served has changed from single head of households to two parent families requesting assistance, the reason may be a result of the economic downturn and the effect it has on two parent households.

Persons with HIV/AIDS

Lowcountry AIDS Services

The City of Charleston's Department of Housing and Community Development has partnered with Lowcountry AIDS Services (LAS) for eight years. LAS provide Housing Opportunities for Persons with AIDS (HOPWA) funds to low- to moderate-income HIV-positive individuals and their families throughout the Tri-County area. Through this partnership, the City is able to maximize its impact on this population. LAS continues to use HOPWA funds effectively to address housing issues and housing/household expenses, assist with utility payments, provide nutritional supplements, and offer supportive services such as case management and financial counseling.

LAS is always working to expand its partnerships and is currently working with the Hispanic Population Migrant Task Force; to reach the Hispanic Population, MUSC provides testing and counseling, the North Charleston Police Department offers crime prevention services and the National Crime Victims Research and Treatment Center assists in providing outreach to adolescent females.

During this program year, LAS expended **\$406,430** in HOPWA funding to assist 557 clients. LAS provided housing assistance to 247 households with HOPWA funds. 24 households were assisted with Tenant-Based Rental Assistance (TBRA), which LAS administers in partnership with the Fort Mill Housing Authority. An additional 223 households were assisted with short-term/emergency mortgage, rent, or utility payments. LAS also provide its clients housing counseling, clinical services, budget counseling, and nutritional services. (For more information, see Form HUD-40110-D in the Appendix.)

Roper Saint Francis Foundation-Ryan White Program

The Roper Saint Francis Foundation is a 501(c)(3)/(9)(3) Type 1 organization in existence since 1986. Their mission is to identify, secure and manage financial resources to support facility projects and healthcare services of Roper, Bon Secours St. Francis and Mount Pleasant Hospitals. The Ryan White Program is apart of the service offerings of the Foundation and serves persons with HIV/AIDS. This is the first year that the City has provided funds to the Foundation.

During this program year, the Roper Saint Francis Foundation received **\$150,000** in HOPWA funding. HOPWA funds coupled with Ryan White Program funds were used to assist a total of 339 clients; 90 households were assisted with short-term/emergency mortgage, rent, or utility payments. An additional three households were assisted with Tenant-Based Rental Assistance (TBRA), which the Roper Saint Francis Foundation administers in partnership with the Fort Mill Housing Authority. The Ryan White Program provides doctor's visits, medication assistance, dental care, mental healthcare, support groups, substance abuse treatment, Insurance

continuation services, case management, and wellness care. (For more information, see Form HUD-40110-D in the Appendix).

Elderly Persons

Canterbury House

The Canterbury House is a nondenominational, non-profit retirement community comprised of two buildings in downtown Charleston. Residents must be 62 years of age or older and meet annual income guidelines set by HUD. Rents are set at HUD's fair market rents. All residents living in the Canterbury East building receive Section 8 rental assistance. Each resident pays a different rent, which is calculated based on their income and any out of pocket medical expenses that they pay. Canterbury House was awarded **\$3,000** from the City's Enston Home funds, which provide a rental subsidy to the five residents in Canterbury West who have the greatest need and receive no other assistance. These residents each received a \$50 rent credit monthly for a year, which reduces their rent payment.

Fair Housing

Forty years ago, Congress passed Title VIII of the Civil Rights Act of 1968 (the "Fair Housing Act"), which prohibits discrimination in public and private housing markets based on race, color, national origin, religion, sex, disability, or familial status. The Act requires communities and the federal government to proactively further fair housing, residential integration, and equal opportunity goals; however, equal opportunity in housing remains a major challenge in the United States, with collateral impact far beyond four walls and a roof.

Locally, greater attention is being given to preserving, as well as, creating affordable workforce housing in the communities of the City of Charleston. The City of Charleston supports the Lowcountry Housing Trust, which provides funding to local development companies, both nonprofit and for-profit to help mitigate the lack of affordable housing options for residents. Greater options, allow residents choice and access to homes that are safe, decent and affordable. The City of Charleston is also supporting the Charleston Trident Urban League (CTUL) in its quest to become a FHIP-Agency. A Fair Housing Initiatives Program Agency provides education and counseling to both tenants and landlords. Additionally, the FHIP Agency has investigative capabilities, previously unavailable to the CTUL who administers the Fair Housing Hotline for the Tri-County area.

The local HUD field office is also beginning to monitor Grantees to ensure that they are implementing the Fair Housing Strategies that are outlined in their Annual Action Plans and Analysis to Impediments. HUD has advised through regional training opportunities that local governments should be keenly aware of their responsibilities related to fair housing and to implementing strategies that will eliminate the challenges persons may face when seeking or residing in a home.

Fair Housing Hotline

The City of Charleston awarded **\$15,000** in CDBG funds to the Charleston Trident Urban League to administer the Fair Housing Hotline. The Hotline received 302 calls from residents of the tri-county area concerning their rights as a tenant. The majority of calls were concerning mold, mildew and the failure of the landlord to correct problems. Telephone counseling and follow up was provided. Most callers requested a site visit. There is a dire need for an investigator to visit and assess the situation clients are facing. The league is currently pursuing funds to extend their services to perform onsite visits to assist tenant who have complaint and concerns.

Through the Hotline, CTUL also offers informational seminars to landlords, tenants, churches, and other interested organizations regarding fair housing and tenant/landlord issues. CTUL held a seminar at the Charleston County Library that served 42 attendees. The majority of the attendees were from other organizations. CTUL continually works with the Charleston Area CDC; providing client referrals, marketing and outreach, Attorney Ginny Howell provides pro-bono services for housing clients that reside in the City of Charleston.

Analysis of Impediments to Fair Housing

In 2003, the City of Charleston's Department of Housing and Community Development partnered with Charleston County's Community Development office to update the area's *Analysis of Impediments to Fair Housing*. This joint effort enabled a maximization of resources and identified the barriers to fair housing in the Charleston area. The Analysis to Impediments (AI) focused on specific issues in each jurisdiction that directly impact the issue of fair housing. Through a thorough analysis and an evaluation of current trends and barriers, the City of Charleston is using the AI and its recommendations to implement a strategy to ensure fair housing and equal opportunity for its citizens. A summary of the AI's recommendations and how the City of Charleston has responded is included on the following pages.

Update of the *Analysis of Impediments to Fair Housing* (Prepared December 2003)

Note: Not all of the remedial actions suggested in the *AI* are directly applicable to the City of Charleston.

A. REAL ESTATE IMPEDIMENTS

Impediment: Housing affordability throughout Charleston County (pages 165-167)

Remedial actions

Status

1. Continue to work with local developers and financial institutions to expand the stock of affordable housing. Particular attention should be paid to increasing the production of affordable housing units in existing low-income neighborhoods.

Ongoing through the Department of Housing and Community Development's First Time Homeownership Initiative.

2. Continue to provide closing cost assistance to homebuyers as resources permit.

The City provides down payment assistance using American Dream Down payment Initiative (ADDI) funds. HOME and CDBG funds. The City also provides closing costs for the sale of properties developed under the City's Homeownership Initiative.

3. Design an employer-assisted housing program.

The City has an employer-assisted housing program and is encouraging other businesses to create similar programs.

B. PUBLIC POLICY IMPEDIMENTS

Impediment: Lack of [adequate] local fair housing legislation or a comprehensive fair housing enforcement program for the Cities of Charleston and North Charleston and Charleston County (pages 168-169)

Remedial actions

1. Increase awareness of fair housing rights, especially to potential homebuyers and tenants.
2. Revise the City of Charleston's fair housing ordinance to recognize familial status, mental handicap, and physical handicap as protected classes.
3. Consider establishing a local fair housing enforcement office, perhaps regional in scope, which may qualify for funding to hire staff to receive and investigate fair housing complaints and technical assistance from the U.S. Department of Housing and Urban Development.

Status

The City has partnered with the City of North Charleston and Charleston County to jointly fund the Fair Housing Hotline which is administered and staffed by the Charleston Trident Urban League (TUL). The Hotline is funded through the City's CDBG funds. CTUL has a certified housing counselor on staff who educates clients about fair housing issues.

The City adopted a revised fair housing ordinance in April of 2006. This ordinance is in conformance with federal fair housing laws and recognizes all of the protected classes.

As mentioned previously, the City of Charleston annually funds the Fair Housing Hotline through the Trident Urban League. The trained and certified housing counselors receive and investigate fair housing complaints. The City of Charleston is in discussion with the CTUL as the proposed securing a FHIP-designation.

Impediment: The length of time required to obtain regulatory approval for housing development in the City of Charleston (pages 169-170)

Remedial actions

1. Consolidate staff review, meetings, and application requirements.

Status

The City has revamped its development review process based on recommendations of a City taskforce which thoroughly reviewed the process. Project management software was introduced to improve the flow of projects. Concurrent reviews by multiple departments, rather than consecutive reviews, are now occurring. A website was established to consolidate information, flowcharts were developed to assist developers in navigating the process, and applications were revised and streamlined. Turnaround time for plan review has decreased, and customer satisfaction is up. Recently, the City also created a taskforce, which allows an assigned staff representative to the development. The

City will continue to evaluate and refine the process.

2. Consolidate regulations into a single document for developers.

The City has created a website to bring together all of the documents pertinent to real estate development. Several checklists have also been developed, as well as flowcharts by type of development, including one for single-family new construction. Also, the Lowcountry Housing Trust with financial support from the City of Charleston has created a developers guide for the development of affordable housing.

3. Facilitate cooperation between City's boards and commissions to reduce number of meetings and public hearings.

Better coordination in the City's development review process has streamlined the process so that projects go to the boards in the correct order, rather than requiring multiple hearings. The City has also convened a Subdivision Review Committee comprised of staff members to allow more staff discretion rather than multiple Planning Commission hearings to deliberate small details or changes.

4. Consider use of joint meetings or consent agendas.

Similar ideas were considered and rejected by the Process Improvement Team. It was found that each level of review was necessary and appropriate. The design review committee is to function as a cooperative body of city staff that would provide a consolidated review.

5. Appoint ombudsman to (a) assist developers in navigating development regulatory processes, (b) to mediate disagreements, and (c) to expedite review when appropriate.

The City's Customer Service Coordinator has been facilitating the receipt and routing of development applications, as well as providing assistance to developers. The City is also proposing an expedited review process for affordable housing.

Impediment: Reduced funding of CARTA for public transportation virtually eliminated public transportation in the County (page 171)

Remedial actions

1. Explore alternative methods of providing funding to CARTA to resume a more extensive route schedule.

Status

A referendum calling for a half-cent sales tax increase within Charleston County to support CARTA (among other items) passed on November 2, 2004. CARTA has since revamped and expanded its bus services. Due to the increase in fuel cost over the last year,

CARTA has seen an exponential increase in ridership. CARTA was also awarded funding through the American Recovery & Reinvestment Act of 2009 that will enable the purchase of several fuel-efficient buses.

2. Identify alternative methods of providing public transportation (including organized car pools or private bus systems) that could be subsidized to provide a cost-effective means of getting people to their places of work.

As part of the reorganization, CARTA expanded bus routes and is using smaller buses to pick up passengers in the region and transport them to a hub where they can access the larger buses. CARTA has also extended the hours of operation of some of its bus routes.

Impediment: Lack of public policy in support of affordable housing (pages 172-173)

Remedial actions

1. Develop public policy to guide decision making relative to affordable housing.
2. Develop a housing market study.
3. Develop housing strategies.
4. Develop a housing needs assessment.

Status

Mayor Riley and City Council have made affordable housing a priority. This year, the Mayor convened the Affordable Housing Incentive Taskforce to evaluate the incentives currently available to encourage the production of affordable housing by private sector developers and to recommend new incentives. The Ordinance was written and has not been adopted by the CD Committee of City Council or City Council.

A study was conducted by the firm J-Quad & Associates, LLC, of Dallas, Texas, subsequent to that firm's completion of the this Analysis of Impediments to Fair Housing. Also, a Housing Market Analysis was conducted by a consultant as a component of the City's 2005-2010 Consolidated Plan, which was completed in April of 2005. The Lowcountry Housing Trust in cooperation with the City of Charleston and the Chamber of Commerce has recently completed an assessment of housing for the calendar year of 2007.

The Department of Housing and Community Development completed a Housing Strategy in August of 2004. This report will be reassessed pending the results of the Lowcountry Housing Trust's housing market study.

A housing needs assessment was conducted

by a consultant as a component of the City's 2005-2010 Consolidated Plan, which was completed in April of 2005.

5. Include a "Housing and Neighborhoods" component in the City's comprehensive plan.

The city's comprehensive plan, the Century V City Plan, does not specifically include a housing component, but does discuss housing on pages 15 and 16 and in Exhibit A, pages 5 through 11. Neighborhoods are discussed on pages 26 through 32. Additionally, in the Preservation and Johns Island Plans that were created in the last year, housing is discussed in full detail.

6. Consider inclusionary zoning as a means of encouraging affordable housing and minimizing the impacts of land cost and increased development cost.

The Affordable Housing Incentive Taskforce (previously discussed) is evaluating possible incentives, including inclusionary zoning, to encourage the development of affordable housing. Recommendations have been made, which support inclusionary zoning. The Ordinance has to go through a vetting process.

7. Use tax increment financing (TIF) districts to fund amenities such as landscaping, entrance treatments, walking/jogging trails, open space, enhanced infrastructure, and special lighting as a means of increasing the appeal of residential developments and reducing NIMBYism.

The Department of Housing and Community Development worked with the Department of Planning and Neighborhoods on a TIF application for the Neck area of the Charleston peninsula as a way to spur investment in this area. The ordinance authorizing the TIF district was adopted at the December 21, 2004 meeting of City Council. No additional TIFs are proposed as of this time. A TIFT is also in place for the Spring/Fishburne Street corridor and one is being requested for the redevelopment of a 336 rental housing development in the West Ashley community.

C. NEIGHBORHOOD CONDITIONS AS IMPEDIMENTS (contains recommendations specific to the City of North Charleston)

BANKING, FINANCE, AND INSURANCE RELATED IMPEDIMENTS

Impediment: Disparity in lending practices throughout the county (page 176)

Remedial actions

Status

1. The City should continue to monitor the Home Mortgage and Disclosure Act data to track area lenders' progress in equalizing home lending practices.

The City plans to pursue this action in early 2010. Preliminary discussions took place with the Charleston Trident Urban League to conduct a review of the HMDA data in cooperation with local banking partners. The City will work with state legislators and local lenders to evaluate and address this issue.

2. The City should work with lenders to expand homeownership and credit counseling classes in order to present more creditworthy minorities to lenders for loan applications.

The City of Charleston funds homeownership classes through the Charleston Trident Urban League's House and Home Program and through the Charleston Area CDC's Financial Literacy Training classes. It also supports the efforts of the Charleston Bank Consortium, which targets lending from several banks to homebuyers in the Charleston area with incomes less than 80 percent of the area median family income. Additionally, the City is continuing its efforts through the Homeownership Initiative to create new, affordably-priced homes on the peninsula, extending the possibility of homeownership to low- to moderate-income citizens.

Impediment: Failure by mortgage lenders to offer products and services to very low-income and minority census tracts exhibiting similar characteristics to those associated with traditional redlining throughout the county (pages 177-178)

Remedial actions

1. The City should work to leverage federal housing funds through partnerships with lending institutions that provide funding for infill development, rehabilitation loans, and home mortgages to encourage renewed investment in deteriorated neighborhoods.
2. The HMDA Analysis included in the Analysis of Impediments should be distributed to lenders in Charleston to highlight concerns and provide them with an overview of local lending activities.

Status

Ongoing. The Department of Housing and Community Development and local non-profit housing developers have strong relationships with members of the lending community. Leveraging federal funds, these non-profits have usually been able to secure funding for infill development from the lenders. The City's federal funding is often invested in infill projects on the Peninsula in community development target areas (through the City's Homeownership Initiative and through its support of Charleston Habitat for Humanity and the Charleston Area CDC). Additionally, rehabilitation projects are financed through the City's Redevelopment and Preservation Commission (funded with federal monies).

As noted previously, the City plans to review the HMDA data in 2010 and then pursue appropriate actions to distribute this information to lenders and other interested parties.

Impediment: Predatory lending practices throughout the county (pages 178-180)

Remedial actions

1. The City should support the State's efforts to provide education on the hazards of predatory lending and maintain a database of certified counselors approved by the South Carolina State Housing Finance and Development Authority for referring citizens with questions about lending practice.

Status

The state's anti-predatory lending legislation went into effect January 1, 2004. The state maintains a list of certified housing counselors at <http://www.schousing.com/library/special%20projects/counselor%20list.pdf>.

HUD maintains a website about predatory lending, including resources for actual or potential victims of predatory lending, at <http://www.hud.gov/offices/hsg/sfh/pred/predlend.cfm>.

Predatory lending, like fair housing, is included as a component of homebuyer classes supported by the City.

The City of Charleston City Council also has passed a Resolution in support of the Anti-Predatory Lending Ordinance prepared by the Appleseed Foundation.

2. The City should work with area lenders

When the City has completed the review of

to develop loan products that meet the needs of borrowers that are likely targets of predatory lenders and provide borrowers with interest rates and provide more assistance in the event that the borrower is late with a payment.

HMDA data, a meeting with lenders will be held to discuss findings and the needs of lower-income homebuyers. Meetings are taking place with local lenders to discuss those lenders adopting a neighborhood. The adoption would allow for enhanced attention to the provision of loan products and other credit needs. The program is being incorporated with the Greater Charleston Empowerment Corporation.

D. SOCIOECONOMIC IMPEDIMENTS

Impediment: Financial literacy education is needed throughout the county.

Remedial actions

1. The City should work with the local school systems to institute a high school course in financial literacy. Local lending institutions and real estate professionals should be recruited to assist in curriculum development and to provide instructors for the classes.
2. The City could sponsor a pilot program in CDBG-eligible census tracts with the use of entitlement funds as a means of launching and demonstrating such an initiative.

Status

Charleston County School District is currently offering entrepreneurial training to its students at the high school level. This training covers financial literacy and business skills. The City has also requested a nonprofit partner expand financial literacy training to include high school junior and seniors.

The City of Charleston provided CDBG funds to the Charleston Area CDC, which offers financial literacy training. 280 clients completed training during the program year. The City also supports the GCEC in partnership efforts with local banks.

Community and Economic Development

Successful community development requires that all sectors of the community – local government, social service providers, businesses, faith-based organizations, public, private and non-profit organizations, and, most importantly, neighborhood residents – work together toward a common goal: improving the quality of life in the community. Each program year, the Department of Housing and Community Development provides funds to several projects which offer economic, social, health care, and educational opportunities to residents of the City's target neighborhoods. With the Renewal Community designation, much of the focus has been on maximizing the tax incentives and stimulating economic growth, including creating job and entrepreneurial opportunities for Renewal Community residents.

The following summary will provide an overview of the City's various activities, partnerships, and programs and their accomplishments in this program year. (Please note some community development projects are discussed in the Youth Development section).

Community Development

Arthur W. Christopher Community Center

The Arthur W. Christopher Community Center is being funded through \$286,702 in CDBG-R funds from the American Recovery and Reinvestment Act. This project consists of the construction of a new LEEDS-certified 24,000 square foot multi-use community center adjacent to the oldest African-American High School in the City of Charleston. The new facility will provide the community with recreational spaces, a large multi-purpose room, an exercise room, a small library, computer room, and meeting areas. The meeting areas will be utilized by the Westside Neighborhood Association, as well as, other entities focused on providing community based services to include, employment and occupational training for students from the local high school, as well as, adult residents of the community who are interested in employment, entrepreneurial and life skills training.

In Charleston, the design and construction industry has been one of the hardest hit by the current recession. Undertaking this construction project is expected to create approximately 98 new jobs in the community. For its sixteen month construction period, the project will employ a general contractor and numerous subcontracting firms. Frequently, small subcontractors and minorities may be hardest hit when construction activity slows. The project has twenty-one percent (21%) participation of minority and women-owned subcontracting companies.

One hundred percent (100%) of the grant funding will be used for construction purposes. It is estimated that at least seventy 70% of the grant amount will benefit persons of low and moderate incomes, with the numbers of construction workers employed, and with the resulting recreational and exercise opportunities made available in the completed facility, which is surrounded by low income housing and a mixed socio-economic neighborhood.

This new building will become the City of Charleston's first LEEDS Gold Certified facility. The design incorporates highly efficient lighting and mechanical systems to minimize energy usage. Natural light is utilized wherever possible to supplant or supplement the need for artificial lighting. Paints and other finishes have been selected for their environmental friendliness. The building will replace an existing antiquated existing structure of very poor efficiency. As an urban infill project in an established, mixed socio-economic neighborhood, it is a good example of smart growth. It will attract many walk-in visitors, and should not encourage significant additional vehicle traffic. The facility will serve as a highly visible example to the community of energy efficient, sustainable design. It will also serve as a prototype for future city projects, which will also be LEEDS certified.

Josiah Smith Tenant House

In March 2007, the City of Charleston purchased the Josiah Smith Tenant House also known as the Eastside Center for Human Concerns. The building is located in the Eastside Community of Charleston where future redevelopment will occur as a result of the construction of the Ravenel Bridge. The redevelopment; a mixed-use, mixed-income development will create residential and business opportunities that will enhance the opportunities made available to residents from the Josiah Smith Tenant House.

The City of Charleston is actively engaged in interviewing perspective tenants for the facility that will lend to eleemosynary purposes as outlined in the original building covenants. The plan is to utilize each floor for office space, while the fourth floor remains as a dental facility. The City of Charleston City Council committed \$1.5m to Elpis Incorporated over ten years. The City is now utilizing the remaining two years of the award to ensure that the building is maintained and to cure the debt that is outstanding on the facility.

Greater Charleston Empowerment Corporation

The Greater Charleston Empowerment Corporation (GCEC) began its partnership with the City of Charleston in 1994. The GCEC (formerly the Enterprise Community Advisory Council) is a 501(c) (3) non-profit corporation chartered in the State of South Carolina. The mission of the organization is to: (1) "promote thriving, healthy and economically viable neighborhoods and empower residents to identify and find solutions to problems that are important to them," (2) to forge partnerships and linkages among residents, the business community, schools non-profit organizations, churches and local government to effectively and efficiently utilize community resources, and (3) to promote ownership in the Renewal (Enterprise) Community programs by neighborhood residents so that at the end of the grant period, programs are self-sustaining.

During the reporting period, the South Carolina Employment Security Commission (SCESC) continued its partnership with the Greater Charleston Empowerment Corporation (GCEC) by providing free office and training space. The SCESC also continues to assist RC companies receiving tax incentives with identifying and referring job applicants.

In addition, the City of Charleston in conjunction with the GCEC implemented a pre employment training program targeting Renewal Community residents. The program consisted of one and two week training sessions conducted over a six month period. The program curriculum provided each trainee with a professional overview of basic employment principles which included:

- Mapping structured individual career goals (short-term/long-term).
- Review of professional attire and attitude for various occupations (career makeover offsite).
- Review of standard human resource documents and forms.
- Cover letter and resume writing.
- Interviewing skills and techniques.
- Job search techniques and marketing of résumé.
- Participation in role playing, mock interviews, etc.

In partnership with the Charleston School of Cosmetology and Dress for Success Incorporated, each trainee was provided free hair makeovers and attire appropriate for job interviews and in

the work place. At the conclusion of each training module, trainees were assisted with permanent job placement.

Fifty-five (55) individuals completed the program, of which 12 or twenty-two percent (22%) were employed.

The GCEC, in partnership with the Charleston County Schools Community Education Program, and the Heirs property Law Center sponsored a five (5) week Heirs Property Seminar at Burke High School. The purpose of the workshops was to assist RC families and individuals who are threatened with losing inherited land due to the lack of or the benefit of a will. The main objectives of the program were to:

- Increase community awareness of the plight of heirs' property interest-holders
- Help educate those who cannot afford to lose their land
- Establish a forum for those interested in land related issues
- Provide legal services to clear title to property

Fifteen (15) individuals completed the six week program.

Renewal community residents continue to participate in the Charleston Police Department's Citizen Advisory Groups located in several Renewal Community neighborhoods. During the meetings, the Police Chief and his Command Staff receive input from residents and provides updates on current anti-crime initiatives. The purpose of the meetings is to increase understanding and cooperation between Citizens and the Police Department.

Through the Office of Neighborhood Services, the city recognized the need and desirability of involving its citizens more directly in its decision making process. To meet this need, a Citizen Participation Plan was designed to achieve improved communication, understanding and cooperation between Charleston citizens and city officials. Eighteen (18) Renewal Community Neighborhood Councils (NC) play an active role in the implementation of the Citizen Participation Plan. The NC's are instrumental in disseminating information among RC residents, and regularly host community meetings dealing with issues affecting the community. Many NC's have hosted meetings with developers, government officials and private enterprises.

The GCEC continues to monitor activity within the Neck to ensure the goals established in the 2004 Neck Plan are actively implemented. During the year, the GCEC worked closely with Clement, Crawford and Thornhill (CC&T) and their planned Neck and Mid Town area developments of over 600 acres of property costing in excess of \$22 million. The GCEC continues to host public meetings for the purpose of introducing the public to the CC&T Mid Town Project and matching Minority Business Enterprises with opportunities within both the Mid Town and Magnolia projects. Their involvement continues to be directly attributed to the leadership shown by the board of the Greater Charleston Empowerment Corporation.

The GCEC continues to partner with the Magnolia Give Back Foundation and CC&T in the implementation of the Neck Area Stay Put Initiative. The Initiative provides funds to residents residing in two RC neighborhoods who face increased property taxes due to major developments within and adjacent to their communities. The Initiative, which covers the increase in property taxes was awarded to 120 residents residing in the Silverhill and Rosemount communities.

The GCEC continues to sponsor its scholarship program. The scholarship program was developed to assist residents of the Renewal/Enterprise Community who desire to attend an institution of higher learning or summer leadership camp and need financial assistance. The

scholarships range from \$1000 to \$2500 per school year and are based on the amount of capital secured by the Empowerment Corporation. The organization seeks funding from a number of community stakeholders, foundations and local businesses. Students are selected based on the submission of a completed application and other criteria developed by the Board. To date, the GCEC has assisted 65 students attain higher education over the last ten years. During the 2008-2009 program years, the GCEC made scholarship awards totaling \$10,000 to six students living in the Renewal Community.

Franklin C. Fetter- Enterprise/MUSC Neighborhood Health Center

The Enterprise Neighborhood Health Center opened in November 2001 and exemplifies the accomplishment of a dream for the Enterprise/Renewal Community. The City of Charleston, the Medical University of South Carolina, the City of North Charleston, Franklin C. Fetter, the Greater Charleston Empowerment Corporation, and the Union Heights Neighborhood Association participated in ensuring the clinic was and remains a success.

Hypertension and diabetes were identified as the most prolific diseases affecting the health of the Enterprise/Renewal Community's residents. The health center provides primary health care services to residents who suffer from these diseases. The clinic also provides primary care services and conducts educational and outreach activities for residents of the Enterprise/Renewal Community and the surrounding areas. The Center is located in the O. Roscoe Mitchell Building and is managed and operated by the Franklin C. Fetter Health Management Group. Because of its location in a federally designated Renewal Community, it is a Federally Qualified Health Center. During the program year, the Center served 5000 clients, primarily with the skills of a nurse practitioner. A physician was also available on a part-time basis.

Each of the partners contributed both financial and in-kind support to ensure the long-term sustainability of the Enterprise Center. Currently, the Fetter Management Group and Board of Directors are sustaining the health center.

Economic Development

Renewal Community

The Renewal Community (RC) initiative continues to serve as a catalyst for community and economic development. This designation provides the City and its business partners the opportunity to impact the economic foundation of the community for years to come. A \$17 billion tax incentive package was awarded to cities that were designated as Renewal Communities. The RC designation encourages economic development through wage credits, tax deductions, bond financing, capital gains, and the New Markets Tax Credits. Many of the incentives accessed by area businesses during the reporting period provided economic growth, job opportunities, and assisted the RC and the City of Charleston in meeting some of the objectives outlined in The Strategic Economic Development Plan (SEDP). The SEDP plan acts as the Renewal Community's blueprint for implementation of various economic development programs. During the reporting period, the RC was expanded from thirteen (13) census tracts and nineteen (19) neighborhoods to eighteen (18) and thirty-one (31) respectively.

Reversing the decline of economic investment in troubled areas is the goal of the Renewal Community's effort. To this end, the City is developing strategies that improve local services, reduce crime, streamline government requirements, increase its involvement in economic development, and enhance the availability of resources. Critical to the success of the use of Renewal Community incentives is continued networking and partnership building to promote these programs through community-based organizations, local businesses, and area

government agencies. These partnerships will increase the use of the tax incentives, increase RC residents' access to jobs, and create the potential for increased business opportunities in the designated area.

Renewal Community tax credits were awarded to six businesses, totaling **\$12M** and leveraging **\$15.2M**. These incentives are projected to create 353 and to retain 18 jobs. (For more information, please see "Commercial Revitalization Deduction Recipients" in the Appendix.)

Brownfields Petroleum Initiative

The City of Charleston received a Brownfields Petroleum grant in the amount of \$200,000 from the U.S. Environmental Protection Agency. The City was fortunate to receive the funding, which enabled the revitalization of sites formerly used as gas stations. The City is worked in collaboration with the S.C. Department of Health and Environmental Control to assist in identifying the appropriate sites for this Initiative. The revitalization of these sites will aid in enhancing the revitalization of the community and in leveraging over \$500,000 in private investment.

Charleston Citywide Local Development Corporation

The Charleston Citywide Local Development Corporation (LDC) is a not-for-profit corporation whose purpose is to assist the growth and development of business concerns, to increase employment opportunities, to encourage the creation and expansion of business and industry and to combat community deterioration. The LDC fulfills its mission by providing technical and financial assistance to small businesses within the greater Charleston metro region while maintaining a heightened focus on the City of Charleston.

To facilitate its goals and mission, the LDC has partnered with the City of Charleston along with federal sources to include the U.S. Small Business Administration, U.S. Department of the Treasury, U.S. Department of Commerce, and the U.S. Department of Agriculture and private funding sources such as the National Trust for Historic Preservation, the Calvert Foundation, and a consortium of local banks. The LDC is an Intermediary Lender for the U.S. Small Business Administration and a designated CDFI and CDE through the U.S. Department of the Treasury. These funding and support partnerships and designations have enabled the LDC to develop and provide financial and technical assistance program offerings for the small business community.

The LDC, as an alternative small business lender, provides financial assistance to eligible businesses through its numerous loan programs - SBA Microloan Program, Small Business Incentive Loan Program, Façade and Corner Store Loan Program, EDA Revolving Loan Fund, Rural Revolving Loan Fund, and its new Disaster Assistance Loan Program. Because the LDC does not compete with the commercial lenders, it works in collaboration with the local banks and all small business resource partners in the community. This benefits the LDC, the lending community and resource organizations as well as the small business concerns. During the time frame that is the subject of this document, the LDC funded 19 businesses with funds totaling nearly \$800,000 which resulted in 124 jobs being created immediately, 71 being retained, and an additional 31 potentially being developed within two years. Of the 19 businesses receiving funding, nine (9) were start-up companies.

The LDC also offers technical assistance to businesses, and in the same given time frame, it had contact with over 2,300 entrepreneurs. Of the contacts, 650 were individuals who received intense assistance through attendance of one or more of over 25 seminars and workshops in which the LDC participated. Additionally, extensive assistance was provided in one-on-one sessions related to business planning, financial structuring or restructuring, and business

operations. The one-on-one sessions provided assistance to 62 MBE, of which 26 were female, and 47 WBE companies.

Related to development opportunities, the LDC continued to refer businesses and developers to the City's Department of Housing and Community Development for information regarding the Commercial Revitalization Program. Additionally, its Executive Director also served on an advisory board and provided information and referral sources for the New Markets Tax Credit Program.

In the early months of 2009, the LDC began serving as a referral source for businesses seeking the SBA ARC loan that was announced as part of the Recovery Act and whose purpose was to provide relief to small businesses. Similarly, the LDC developed a restructuring program for borrowers in its own portfolio who were challenged by the state of the economy and proactively contacted the businesses to encourage participation.

Given the economic crisis that affected the small business community, the year in review was one of heightened activity both for funding requests and technical assistance solicited.

Youth Development

The City of Charleston recognizes that developing the potential of a community's youth is a critical issue if the community is to survive and thrive. Thus the City of Charleston is committed to developing programs that motivate and encourage youth to strive for excellence and make great achievements, as well as working with local organizations that implement programs for the same cause.

A major problem in many economically challenged areas is student inability to perform academically. This impedes students' ability to graduate high school or they graduate without the skills they need to succeed economically or socially in the 21st century workplace. Opportunities for high-quality education and job readiness training will define the success of our youth and our community.

Various programs in the community are designed to ensure these students are inspired to stay in school, have the opportunities for personal growth and development, and have access to skills training and job readiness, which will allow them to work in any position they desire. It is critical to community development efforts that area leaders support high-quality early childhood development, including childcare services, after-school programs, prevention programs, and other innovative ways to engage youth in positive community interaction. The development and support of exciting projects and educational programs that promote active, comprehensive learning for area youth will ensure an increased quality of life, a positive social experience, a successful educational career, and an employable future.

The City of Charleston supports the Greater Charleston Empowerment Corporation (GCEC) in its scholarship program, which encourages youth who have completed high school to pursue attendance at an institution of higher education.

Further, the City supports the Weed and Seed's Project KOINS and Teen Court, which actively engages students in improving their community and improving their understanding and need to perform community service.

Camp Hope (Building Dreams and Creating Legacies)

Camp Hope is now in its 3rd session. The 5-week camp will host fifty children between the ages of 7 – 12 who attend Fraser Elementary School or live in the surrounding community. The camp is held from 6:00 p.m. to 9:00 p.m. June 15 – August 7 at Fraser Elementary School at 63 Columbus Street.

Applications for the camp are distributed and collected by school officials. The goal of the camp is to provide a positive and empowering environment for the children that will allow them the opportunity to express themselves in a productive manner while exposing them to diverse recreational, educational and social opportunities.

Camp activities include swimming, mentoring, role modeling, leadership skills development, cultural arts, crime and fire prevention, drug awareness, dancing and health screening. The camp will provide a structured educational component to boost the learning which takes place through other areas and help strengthen skills in specific areas. This fun learning experience is made possible by the College of Charleston's Department of Education's Center for Partnership to Improve Education.

The camp is made possible due to the commitment of the following organizations: 100 Black Men of Charleston, Inc., Cannon Street YMCA, Charleston County School District, College of Charleston, Charleston Fire Department, Charleston Police Department, City of Charleston, City

of Charleston Recreation Department, Low Country Food Bank, SpiritLine Cruises, Charleston RiverDogs and the Mayor's Office for Children, Youth and Families. The camp began two years ago as a 5-week Pilot program. There are 75 children enrolled in the current camp session.

Weed and Seed Program

The Weed and Seed program, administered by the City of Charleston's Police Department, is a comprehensive initiative that focuses on training youth and mitigating their involvement in drug-related crimes by having youth participate in the upkeep, restoration and rehabilitation of their neighborhoods. During the program year, the City committed **\$132,210** to the operation of the program. Project KOINS (Kids Organized to Improve Neighborhood Streets) is one facet of the Weed and Seed program. KOINS engages youth ages ten (10) to fifteen (15) in the physical cleanup of their neighborhood by picking up trash and other debris which contribute to the degraded physical appearance of a neighborhood. The youth are compensated with a weekly stipend for their participation in the program. An average of 50 youth participated in three sessions the past year.

Another initiative of the Weed and Seed Program is Teen Court. This initiative allows students who are first-time offenders of a non-violent crime to appear before a court of his/her peers. Once the juvenile's case has been adjudicated and if he/she is found guilty, the Court then determines an appropriate act of restitution (i.e., community service, essays, and monetary reimbursement) for the crime. Upon completion of their sentence their record is expunged. The S.C. Bar Association, Young Lawyers Division, assists in conducting training for the Youth Court Program.

During the past year, the Charleston/North Charleston area continued as one of 12 sites selected to participate in a national Reentry Initiative to help reduce the rate of recidivism of previously incarcerated offenders, including youth. The Site has been successful in working with over 100 representatives from the law enforcement, judiciary, neighborhoods, service providers as well as ex-offenders who meet to discuss implementing strategies based on national best practices in prisoner re-entry. The South Carolina Reentry Initiative (SCRI) has had several successful programs, including Lowcountry Civic Justice Corp and hosted a successful Reentry summit for the state and local legislative, judiciary and law enforcement leaders in October 2008 at the College of Charleston. Approximately 120 participants attended representing agencies from across the state.

Section 3

The City of Charleston promotes Section 3 opportunities for area residents and minority businesses in the City of Charleston. The internal construction team and our external non-profit and for-profit housing providers are able to significantly impact the number of Section 3 employees recruited and the number of MBE/WBE firms provided employment and entrepreneurial opportunities. The Section 3 requirements are outlined in pre-construction conferences. Brochures and recruitment forms are provided, and contractors define the types of employment opportunities available at the project construction site.

Using the City's Minority Business Development (MBD) Office as a resource, general contractors awarded contracts are encouraged to hire local minority- or women-owned subcontractors and employees on their projects. The City's Parks Department also maintains a list of qualified contractors, which is provided upon request to general contractors awarded federally-funded projects. Contractors are also encouraged to place advertisements in *The Post and Courier*, *The Chronicle*, radio broadcasts, and to list available positions with the South Carolina Employment Security Commission.

The City's MBD Office continues to expand the database of potential contractors to increase Section 3 outreach. The MBD Office has expanded its collaboration with the Lowcountry Historically Underutilized Business (HUD) Contractor Academy, which is a partnership of the City of Charleston, the City of North Charleston, Charleston County and other private partners. The HUB Academy provides contractors and subcontractors with training and technical assistance, which enables them to be more productive and effective when job and bidding opportunities are presented. The Department of Housing and Community Development has encouraged the HUB academy to expand its offering by providing an advanced training module for its participants. Section 3 opportunities provide jobs to residents and positively impacts economic and community development. During the program year, the Contract/Subcontract Activity totaled \$286,925 of that amount; the City awarded \$118,025 to section-3 qualified contractors.

Performance Measurement

The City of Charleston's Consolidated Plan was approved by HUD in June 2005. The Consolidated Plan has been a valuable strategic planning document for providing guidance and structure to the City's efforts in its housing initiatives, community and economic development, and neighborhood revitalization in the City of Charleston. The five-year plan provides clear direction in implementing projects and programs that help the City's Department of Housing and Community Development to realize defined goals and objectives in achieving its overall mission. The Consolidated Plan, as with previous plans, was prepared in concert with neighborhood residents, non-profit and for-profit housing providers, and other community stakeholders. The City of Charleston will begin seeking consulting services for the preparation of the 2010-2015 Consolidated Plan. The plan will be due to the Department of Housing and Urban Development April 15, 2010.

As applications for funding were received for the 2008-2009 program year, a detailed evaluation process weighed each applicant's ability to meet the objectives of the program. The goals and objectives were identified by the Con Plan and executed based on the criteria outlined in the Performance Measurement System. These criteria were outlined in the contractual (funding) agreements executed between the City of Charleston and local entities. Funding is awarded based on the organization's commitment to these specified objectives, its program activities, its capacity to deliver services, develop partnerships, and leverage additional funds to support the program for the designated program year, as well as, for the long-term. On-site monitoring and evaluations determine the goals and the accomplishments attained during the program year. These evaluations not only help determine the performance, but also will affect the organization's ability and capacity to partner on future developments.

The Annual Action Plan for June 1, 2008 to May 31, 2009 was submitted in April 2008. This plan detailed what the City of Charleston and its partners anticipated accomplishing in the 2008-2009 program year. The Annual Action Plan provides an illustration of how the City and its partners would achieve the stated goals and objectives for the program year. All programs and projects funded through the Department of Housing and Community Development are consistent with both the Consolidated Plan and the Annual Action Plan.

The City of Charleston's 2005-2010 Consolidated Plan established four primary goals for the term of the plan: improve the quality and quantity of affordable housing; provide expanded economic opportunities; provide a suitable living environment and develop the capacity of local housing and service providers. The City is pleased to have made progress in meeting each of these goals. Through partnerships, which leverage additional funds and expertise, the City has been able to maximize its HUD funding to address critical housing, economic development, and community development needs.

The performance of the City of Charleston and its grantees were directly linked to the criteria established by HUD in late 2005. The enhanced performance measurement enabled HUD to capture data on program outcomes from grantees, which allowed HUD to more accurately report the success of programs to Congress and the President of the United States, measure more succinctly the success of Grantee programs and improve the design/framework of programs that were not experiencing success in their communities.

Implementation of Planned Goals

The City of Charleston places great emphasis on accomplishing the goals as outlined in the Annual Action Plan, which lends to fulfillment of the Consolidated Plan and the needed change in the communities served by the City of Charleston and its local partners. Beginning with the 2007 program year, the City advised its subrecipients during the annual orientation of the implementation of the Outcome Measurement System being implemented by the Department of Housing and Urban Development (HUD). Discussions were held advising how the system would be implemented and monitored by the City of Charleston. Performance language was and is included in each contract prepared and executed with a subrecipient. The language was based on three objectives and outcomes as described in the next paragraph.

Outcomes

In 2005, the Department of Housing and Urban Development (HUD) provided training to Participating Jurisdictions and Grantees on the Community Planning and Development Outcome Measurement System. This system, as previously described, would provide the appropriate measures to enable HUD to share with Congress, State and local officials, the successes and challenges Grantees were experiencing in the implementation of the various programs. The system would look specifically at three objectives, outcomes and outcome statements, which include the following:

	Outcome 1: Availability/Accessibility	Outcome II: Affordability	Outcome III: Sustainability
Objective 1: Suitable Living Environments	Accessibility for the purpose of creating suitable living environments.	Affordability for the purpose of creating suitable living environments.	Sustainability of the purpose of creating suitable living environments.
Objective 2: Decent Housing	Accessibility for the purpose of providing decent housing.	Affordability for the purpose of providing decent housing.	Sustainability for the purpose or providing decent housing.
Objective 3: Economic Opportunity	Accessibility of the purpose of creating economic opportunity.	Affordability for the purpose of creating economic opportunity.	Sustainability for the purpose of creating economic opportunity.

Achievement of Stated Goals

The City of Charleston is making great strides in achieving the goals as outlined in the Consolidated Plan. However, we have a great deal more to accomplish and will enhance our efforts to attain and exceed the goals as outlined. The City's accomplishments are described on the following pages, including:

- ◆ The overall goal.
- ◆ The specific strategy to achieve the goal.
- ◆ The five-year goal based on the timeframe of the Consolidated Plan.
- ◆ Accomplishments from the prior and current reporting years.
- ◆ Performance Measurement Category.

Leveraging

HUD Resources Expended

\$1,452,542.34	CDBG entitlement funds
\$320,594.00	CDBG program income
\$435,521.87	HOME funds
\$524,184.45	HOPWA funds
\$12,685.38	Enterprise funds
12,000,000.00	RC Tax Incentives

\$14,745,528.04	TOTAL
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Housing

\$1,125,000.00	Homeownership Initiative – first mortgages
\$410,000.00	Lowcountry Housing Trust
\$75,000.00	Fair Housing Hotline
\$235,905.00	Lead and Minor Repairs
\$120,284.50	9 Dewey Street & 204 Fishburne Street
\$5,000,000.00	CDBG-R General Fund
\$1,634,830.00	Neighborhood Stabilization Program

\$8,601,019.50	TOTAL
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Special Needs Populations

\$1,250,324.00	Continuum of Care
\$399,000.00	Lowcountry AIDS Services
\$475,583.00	Roper Saint Francis Foundation

\$1,726,306.00	TOTAL
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Community & Youth Development

\$35,000.00	Camp Hope
\$132,210.00	Weed and Seed

\$167,210.00	TOTAL
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Community and Economic Development

\$286,702.00	Author W. Christopher Community Center
\$15,180,124.00	CRD projects

\$15,466,826.00	TOTAL
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2008-2009 Total Leveraging of Resources by HUD funds expended by the City

\$40,695,889.54	Total leveraging of resources by HUD funds expended by City
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City of Charleston CAPER 2008-2009

Appendix

- ◆ City of Charleston 2008-2009 Housing Beneficiary Chart
- ◆ City of Charleston 2008-2009 Commercial Revitalization Deduction Recipients
- ◆ HOME Match Report
- ◆ HOPWA Consolidated Annual Performance and Evaluation Reports (Form HUD-40110-D)
- ◆ CDBG Financial Summary [PR26] (included in HUD and Departmental copies)
- ◆ Contract and Subcontract Activity Report

Housing Opportunities for Persons with AIDS (HOPWA) Consolidated Annual Performance and Evaluation Report – (Lowcountry AIDS Services) Measuring Performance Outcomes

OMB Number 2506-0133 (Expiration Date: 12/31/2010)

Part 1: Grantee Executive Summary

As applicable, complete the charts below followed by the submission of a written narrative to questions A through C, and the completion of Chart D. Chart 1 requests general grantee information and Chart 2 is to be completed for each organization selected or designated as a project sponsor, as defined by CFR 574.3. In Chart 3, indicate each subrecipient organization with a contract/agreement of \$25,000 or greater that assists grantees or project sponsors carrying out their activities. Agreements include: grants, subgrants, loans, awards, cooperative agreements, and other forms of financial assistance; and contracts, subcontracts, purchase orders, task orders, and delivery orders. These elements address requirements in the Federal Funding and Accountability and Transparency Act of 2006 (Public Law 109-282).

1. Grantee Information

HUD Grant Number 12699		Operating Year for this report <i>From (mm/dd/yy) 06/01/2008 To (mm/dd/yy) 05/31/2009</i>		
Grantee Name Charleston				
Business Address		145 King Street, Suite 400		
City, County, State, Zip		Charleston	Charleston County	S.C. 29401
Employer Identification Number (EIN) or Tax Identification Number (TIN)		57-6000226		DUN & Bradstreet Number (DUNs) if applicable 077990786
Congressional District of Business Address		Congressional District 1		
*Congressional District(s) of Primary Service Area(s)		Congressional Districts of Primary Service – Districts 1 & 6		
*Zip Code(s) of Primary Service Area(s)		29401 29403 29407 29412 29455 29492		
*City(ies) and County(ies) of Primary Service Area(s)		City of Charleston and Charleston County		
Organization's Website Address www.charlestoncity.info		Does your organization maintain a waiting list? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, explain in the narrative section how this list is administered.		
Have you prepared any evaluation reports? <i>If so, please indicate the location on an Internet site (url) or attach copy.</i> http://www.charlestoncity.info/shared/docs/0/2008%20caper.pdf				

* Service delivery area information only needed for program activities being directly carried out by the grantee

2. Project Sponsor Information

In Chart 2, provide the following information for each organization designated or selected to serve as a project sponsor, as defined by CFR 574.3.

Project Sponsor Agency Name Lowcountry AIDS Services		Parent Company Name, <i>if applicable</i>		
Name and Title of Contact at Project Sponsor Agency	Bradley Childs, Executive Director			
Email Address	bchilds@aids-services.com			
Business Address	3547 Meeting Street Road			
City, County, State, Zip,	Charleston	Charleston County	S.C.	29401
Phone Number (with area codes)	843-747-2273		Fax Number (with area code) 843-745-0431	
Employer Identification Number (EIN) or Tax Identification Number (TIN)	57-0905550		DUN & Bradstreet Number (DUNs) <i>if applicable</i>	
Congressional District of Business Location of Sponsor	District #1			
Congressional District(s) of Primary Service Area(s)	Districts # 1 and 6			
Zip Code(s) of Primary Service Area(s)				
City(ies) and County(ies) of Primary Service Area(s)	Berkeley County, Dorchester County and Charleston County			
Total HOPWA contract amount for this Organization				
Organization's Website Address www.aids-services.com		Does your organization maintain a waiting list? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Is the sponsor a nonprofit organization? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Please check if yes and a faith-based organization. <input type="checkbox"/> Please check if yes and a grassroots organization. <input type="checkbox"/>		If yes, explain in the narrative section how this list is administered.		

3. Subrecipient Information

In Chart 3, provide the following information for each subrecipient with a contract/agreement of \$25,000 or greater that assist the grantee or project sponsors to carry out their administrative or service delivery functions. Agreements include: grants, subgrants, loans, awards, cooperative agreements, and other forms of financial assistance; and contracts, subcontracts, purchase orders, task orders, and delivery orders. (Organizations listed may have contracts with project sponsors or other organizations beside the grantee.) These elements address requirements in the Federal Funding and Accountability and Transparency Act of 2006 (Public Law 109-282).

Subrecipient Name Fort Mill Housing Services, Inc.		Parent Company (if applicable)		
Name and Title of Contact at Subrecipient	Mr. Joseph K. Beasley, TBRA (Tenant Based Rental Assistance)			
Email Address				
Business Address	P.O. Box 220			
City, State, Zip, County	Fort Mill	S. C.	York County	29716-0220
Phone Number (with area code)	803-547-6807		Fax Number (with area code) 803-548-2125	
Employer Identification Number (EIN) or Tax Identification Number (TIN)			DUN & Bradstreet Number (DUNS) if applicable	
North American Industry Classification System (NAICS) Code				
Congressional District of Location	Congressional District One			
Congressional District of Primary Service Area	Charleston			
Zip Code of Primary Service Area(s)	29404 29405 29407			
City(ies) and County(ies) of Primary Service Area(s)	N, Charleston, Goose Creek, Summerville, W. Ashley			
Total HOPWA Contract Amount				

A. Grantee and Community Overview

Provide a one to three page narrative summarizing major achievements and highlights that were proposed and completed during the program year. Include a brief description of the grant organization, area of service, the name(s) of the program contact(s), and an overview of the range/type of housing activities provided. This overview may be used for public information, including posting on HUD's website. *Note: Text fields are expandable.*

The City of Charleston receives Housing Opportunities for Persons with AIDS (HOPWA) funding to administer in the Berkeley, Charleston, and Dorchester Counties of coastal South Carolina. The City awards its HOPWA funding based on a request for proposals. For the past several years, only Lowcountry AIDS Services has responded, thus all awards have been made to this organization.

Lowcountry AIDS Services (LAS) is a non-profit 501(c) (3) social service agency serving men, women, and children with HIV/AIDS. In 1990, Lowcountry AIDS Services became a wholly autonomous agency. It is the only private or public organization in the Trident district (Charleston, Berkeley, and Dorchester Counties) whose sole purpose is dealing with the issues of HIV infection and AIDS. LAS provide its clients HIV testing, prevention education, and case management, which includes housing counseling, clinical services, budget counseling, and nutritional services. LAS also offer a tenant-based rental assistance program and a short-term rent, mortgage, and utility assistance program.

B. Annual Performance under the Action Plan

Provide a narrative addressing each of the following four items:

1. Outputs Reported. Describe significant accomplishments or challenges in achieving the number of housing units supported and the number households assisted with HOPWA funds during this operating year compared to plans for this assistance, as approved in the Consolidated Plan/Action Plan. Describe how HOPWA funds were distributed during your program year among different categories of housing and geographic areas to address needs throughout the grant service area, consistent with approved plans.

Annual Performance under the Action Plan

During the program year, LAS assisted two hundred forty-seven (247) households with housing assistance. Twenty-four (24) households received rental assistance through the tenant-based rental assistance program which is administered by the Fort Mill Housing Authority (under contract with LAS). Two-hundred twenty three (223) households received short-term rent, mortgage, and utility assistance to prevent homelessness. A total of three hundred thirty-eight (338) persons received case management through LAS during the program year.

LAS does not currently own or administer any facility-based housing or stewardship units. However, LAS has signed a memorandum of agreement with the Humanities Foundation to set aside five (5) apartments for LAS clients. Each unit holds a 25-year restricted covenant for rental to persons living with HIV/AIDS. LAS allocated \$28,000 from its 2004 HOPWA award and its entire 2005 award (\$390,000) to secure the agreement. The five rental units were completed in 2007 and all are presently occupied.

Outcomes Assessed. Assess program goals against actual client outcomes for achieving housing stability, reducing risks of homelessness, and improving access to care. If current year results are lower than the national program targets (80 percent of HOPWA clients maintain housing stability, avoid homelessness and access care), please describe the steps being taken to achieve the national outcome goal in next operating year.

Lowcountry AIDS Services has identified an annual goal of 200 households that will be provided with housing through activities that provide short-term rental assistance, mortgage and utility assistance payments to prevent homelessness.

Our Tenant Based Rental Assistance Program will be at capacity providing 24 units for individuals and families that are infected or affected with HIV/AIDS.

Construction of 5 (five) units were completed in May 2007. These units hold a 25 year restricted covalence per unit for people living with HIV/AIDS. All five units are presently occupied. This will provide one hundred twenty five (125)

years of housing for our clients.

3. Coordination. Report on program coordination with other mainstream housing and supportive services resources, including the use of committed leveraging from other public and private sources that helped to address needs for eligible persons identified in the Consolidated Plan/Strategic Plan.

We work in a collaborative effort with the Medical University of South Carolina to provide Case Management and support services to their patients in the Infectious Disease Clinic. We maintain daily contact with their case managers about coordinated services. A significant factor in service coordination is a quarterly Social Service meeting convened by Lowcountry AIDS Services to bring together Case Managers and other professionals from MUSC, Substance Abuse Treatment Centers, Community Long Term Care and The Housing Authority. At these meetings clients who use the services of these agencies are discussed to ensure that a smooth continuum of care is followed and that no one is falling through the cracks.

We are members of the Trident HIV Coalition and attend all meetings to ensure that our practices and programs are keeping up with the new trends of the disease. Additionally, we are members of the Statewide Group of HIV/AIDS Case Managers who convene monthly to formulate standards for Case Management and to exchange ideas for improved practice.

Our project with Humanities Foundation in the construction of housing for individuals living with HIV/AIDS has been completed and all 5 units have been filled.

4. Technical Assistance. Describe any program technical assistance needs and how they would benefit program beneficiaries.

New computer program, Provide Enterprise, continues to have many issues that need to be resolved before accuracy in reporting will be consistent and trustworthy.

C. Barriers and Trends Overview

Provide a narrative addressing items 1 through 3. Explain how barriers and trends affected your program's ability to achieve the objectives and outcomes discussed in the previous section.

1. Describe any barriers (including regulatory and non-regulatory) encountered, actions taken in response to barriers, and recommendations for program improvement. Provide an explanation for each barrier selected.

LAS face many challenges in providing services. South Carolina currently ranks ninth in the nation for new HIV infections, and the infection rate is rising. LAS is seeing increased infection rates in Hispanics, senior citizens, African American women, and the gay community. LAS is also challenged by a lack of staffing in light of declining federal funding. Decreasing funding and increasing infection rates, coupled with better medications that prolong clients' lives, have lead to extremely high case loads for the case managers. LAS continues to seek additional funding sources, including holding innovative fundraisers, to meet the challenge of reduced funding availability.

Persons with HIV/AIDS continue to be stigmatized. LAS is combating the stigma of HIV/AIDS by providing education and awareness of the disease along with services to infected individuals. LAS's most valuable asset is our staff, who treats all clients with compassion and respect.

X HOPWA/HUD Regulations	<input type="checkbox"/> Planning	X Housing Availability	X Rent Determination and Fair Market Rents
X Discrimination/Confidentiality	<input type="checkbox"/> Multiple Diagnoses	X Eligibility	<input type="checkbox"/> Technical Assistance or Training
X Supportive Services	X Credit History	X Rental History	X Criminal Justice History
X Housing Affordability	<input type="checkbox"/> Other, please explain further		

2. Describe any trends in the community that may affect the way in which the needs of persons living with HIV/AIDS are being addressed, and provide any other information important to the future provision of services to this population.

While many clients have been helped, a problem exists regarding the limited, short-term nature of HOPWA financial assistance, which is not to exceed 21 weeks per 52-week period. A consistent percentage of clients require long-term assistance for a variety of reasons. Some clients are not able to work and yet have not been able to obtain disability benefits due to HIV/AIDS, or find that the application process extends beyond one year. Other clients have histories of drug abuse and treatment, yet the

only affordable housing that is available is in neighborhoods of heavy drug use, thus hampering their recovery. Many of the latter clients have children, thus increasing the urgency to find housing in safe, drug-free areas. Some clients are displaced due to fires or property condemnation and consequently need assistance beyond the parameters of the short-term program.

Housing costs in the Charleston area have continued to outpace local incomes, leading to a severe shortage of safe, decent, and affordable housing. The rising housing costs continue to be a significant challenge to ensuring clients are stably housed.

3. Identify any evaluations, studies, or other assessments of the HOPWA program that are available to the public.

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D. Unmet Housing Needs: An Assessment of Unmet Housing Needs

In Chart 1, provide an assessment of the number of HOPWA-eligible households that require housing assistance but are not currently served by HOPWA in this service area.

In Line 1, report the total unmet need of the geographical service area, as reported in *Unmet Needs for Persons with HIV/AIDS*, Table 1B of the Consolidated or Annual Plan(s), or as reported under HOPWA worksheet in the Needs Workbook of the Consolidated Planning Management Process (CPMP) tool. *Note: Report most current data available, through Consolidated or Annual Plan(s), and account for local housing issues, or changes in HIV/AIDS cases, by using combination of one or more of the sources in Chart 2.*

In Rows a through c, enter the number of HOPWA-eligible households by type of housing assistance whose housing needs are not met. For an approximate breakdown of overall unmet needs by type of housing assistance refer to the Consolidated or Annual Plan (s), CPMP tool or local distribution of funds.

1. Assessment of Unmet Need for HOPWA-eligible Households

1. Total number of households that have unmet housing needs	= 0
From Item 1, identify the number of households with unmet housing needs by type of housing assistance	
a. Tenant-Based Rental Assistance (TBRA)	= 2
b. Short-Term Rent, Mortgage and Utility payments (STRMU)	= 0
c. Housing Facilities, such as community residences, SRO dwellings, other housing facilities	= 0

2. Recommended Data Sources for Assessing Unmet Need (check all sources used)

<input checked="" type="checkbox"/> = Data as reported in the area Consolidated Plan, e.g. Table 1B, CPMP charts, and related narratives
<input type="checkbox"/> = Data established by area HIV/AIDS housing planning and coordination efforts, e.g. Continuum of Care
<input type="checkbox"/> = Data from client information provided in Homeless Management Information Systems (HMIS)
<input type="checkbox"/> = Data from project sponsors or housing providers, including waiting lists for assistance or other assessments on need
<input type="checkbox"/> = Data from prisons or jails on persons being discharged with HIV/AIDS, if mandatory testing is conducted
<input type="checkbox"/> = Data from local Ryan White Planning Councils or reported in CARE Act Data Reports, e.g. number of clients with permanent housing
<input type="checkbox"/> = Data collected for HIV/AIDS surveillance reporting or other health assessments, e.g. local health department or CDC surveillance data

[1] Sources of Leveraging		Total Amount of Leveraged Dollars (for this operating year)	
		[2] Housing Assistance	[3] Supportive Services and other non-direct housing costs
1.	Program Income		
2.	Federal government (please specify):	=	=
	Ryan White CARE Act Part B	=	
		=	=
		=	=
3.	State government (please specify)	=	=
		=	=
		=	=
		=	=
4.	Local government (please specify)	=	=
		=	=
		=	=
		=	=
5.	Foundations and other private cash resources (please specify)	=	=
	Trident United Way	=	
	Private, Unrestricted donations		
		=	=
6.	In-kind Resources	=	=
7.	Resident rent payments in Rental, Facilities, and Leased Units	=	=
8.	Grantee/project sponsor (Agency) cash	=	=
9.	TOTAL (Sum of 1-7)		

PART 2: Sources of Leveraging

Report the source(s) of cash or in-kind leveraged federal, state, local or private resources identified in the Consolidated or Annual Plan and used in the delivery of the HOPWA program and the amount of leveraged dollars.

PART 3: Accomplishment Data - Planned Goal and Actual Outputs

In Chart 1, enter performance information (goals and actual outputs) for all activities undertaken during the operating year supported with HOPWA funds. Performance is measured by the number of households and units of housing that were supported with HOPWA or other federal, state, local, or private funds for the purposes of providing housing assistance and support to persons living with HIV/AIDS and their families. *Note: The total households assisted with HOPWA funds and reported in PART 3 of the CAPER should be the same as reported in the annual year-end IDIS data, and goals reported should be consistent with the Annual Plan information. Any discrepancies or deviations should be explained in the narrative section of PART 1.*

1. HOPWA Performance Planned Goal and Actual Outputs

	HOPWA Performance Planned Goal and Actual	Output Households				Funding	
		HOPWA Assistance		Non-HOPWA			
		a.	b.	c.	d.	e.	f.
		Goal	Actual	Goal	Actual	HOPWA Budget	HOPWA Actual
	Housing Subsidy Assistance	Output Households					
1.	Tenant-Based Rental Assistance	27	24			152,360	
2a.	Households in permanent housing facilities that receive operating subsidies/leased units	0	0				
2b.	Households in transitional/short-term housing facilities that receive operating subsidies/leased units	0	0				
3a.	Households in permanent housing facilities developed with capital funds and placed in service during the program year	0	0				
3b.	Households in transitional/short-term housing facilities developed with capital funds and placed in service during the program year						
4.	Short-Term Rent, Mortgage and Utility Assistance	200	223		4	103,554	
5.	Adjustments for duplication (subtract)						
6.	Total Housing Subsidy Assistance	227	247				
	Housing Development (Construction and Stewardship of facility based housing)	Output Units					
7.	Facility-based units being developed with capital funding but not opened (show units of housing planned)	0	0				
8.	Stewardship Units subject to 3 or 10 year use agreements	0	0				
9.	Total Housing Developed	0	0				
	Supportive Services	Output Households					
10a.	Supportive Services provided by project sponsors also delivering HOPWA housing assistance	275	338			112,066	
10b.	Supportive Services provided by project sponsors serving households who have other housing arrangements	250	388				
11.	Adjustment for duplication (subtract)	0	0				
12.	Total Supportive Services	600	726				
	Housing Placement Assistance Activities						
13.	Housing Information Services	0	0				
14.	Permanent Housing Placement Services	30	25				
15.	Adjustment for duplication	0	0				
16.	Total Housing Placement Assistance	30	25			10,000	
	Grant Administration and Other Activities						
17.	Resource Identification to establish, coordinate and develop housing assistance resources						
18.	Technical Assistance (if approved in grant agreement)						
19.	Grantee Administration (maximum 3% of total HOPWA grant)						
20.	Project Sponsor Administration (maximum 7% of portion of HOPWA grant awarded)						
	Total Expenditures for program year (Sum of rows 6, 9, 12, 16, and 20)						

2. Listing of Supportive Services

Report on the use of HOPWA funds for all supportive services. In Rows 1 through 16, provide the (unduplicated) total of all households and expenditures for each type of supportive service for all project sponsors.

Supportive Services		Number of Households Receiving HOPWA Assistance	Amount of HOPWA Funds Expended
1.	Adult day care and personal assistance		
2.	Alcohol and drug abuse services		
3.	Case management/client advocacy/ access to benefits & services	478 unduplicated	
4.	Child care and other child services		
5.	Education		
6.	Employment assistance and training		
7.	Health/medical/intensive care services, if approved Note: Client records must conform with 24 CFR §574.310		
8.	Legal services		
9.	Life skills management (outside of case management)		
10.	Meals/nutritional services	319 unduplicated	
11.	Mental health services		
12.	Outreach		
13.	Transportation	79 unduplicated	
14.	Other Activity (if approved in grant agreement). Specify:		
15.	Adjustment for Duplication (subtract)	150	
16.	TOTAL Households receiving Supportive Services (unduplicated)	726 unduplicated	

Part 4: Summary of Performance Outcomes

HOPWA Long-term Performance Objective: *Eighty percent of HOPWA clients will maintain housing stability, avoid homelessness, and access care each year through 2011.*

Section 1. Housing Stability: Assessment of Client Outcomes on Maintaining Housing Stability (Permanent Housing and Related Facilities)

In Column 1, report the total number of eligible households that received HOPWA housing assistance, by type. In Column 2, enter the number of households continuing to access each type of housing assistance, the following year. In Column 3, report the housing status of all households that exited the program. Columns 2 (Number of Households Continuing) and 3 (Exited Households) summed will equal the total households reported in Column 1.

Note: Refer to the housing stability codes that appear in Part 5: Worksheet - Determining Housing Stability Outcomes.

[A] Permanent Housing Assistance	[1] Total Number of Households Receiving Housing Assistance	[2] Assessment: Number of Households Continuing with this Housing (per plan or expectation for next year)		[3] Assessment: Number of Exited Households and Housing Status	
Tenant-Based Rental Assistance	= 19	= 24	1 Emergency Shelter/Streets	0	
			2 Temporary Housing	0	
			3 Private Housing	24	
			4 Other HOPWA	0	
			5 Other Subsidy	0	
			6 Institution	0	
			7 Jail/Prison	0	
			8 Disconnected/Unknown	1	
			9 Death	2	
Permanent Supportive Housing Facilities/Units	= 0	= 0	1 Emergency Shelter/Streets	= 0	
			2 Temporary Housing	= 0	
			3 Private Housing	= 0	
			4 Other HOPWA	= 0	
			5 Other Subsidy	= 0	
			6 Institution	= 0	
			7 Jail/Prison	= 0	
			8 Disconnected/Unknown	= 0	
			9 Death	= 0	
[B] Transitional Housing Assistance	[1] Total Number of Households Receiving Housing Assistance	[2] Of the Total Number of Households Receiving Housing Assistance this Operating Year		[3] Assessment: Number of Exited Households and Housing Status	
Transitional/Short-Term Supportive Facilities/Units	247	Total number of households that will continue in residences:	223=	1 Emergency Shelter/Streets	= 0
				2 Temporary Housing	= 25
				3 Private Housing	= 188
				4 Other HOPWA	= 0
				5 Other Subsidy	= 0
				6 Institution	= 4
				7 Jail/Prison	= 7
				8 Disconnected/unknown	= 16
				9 Death	= 7
		Total number of households whose tenure exceeded 24 months:	= 35		

Section 2. Prevention of Homelessness: Assessment of Client Outcomes on Reduced Risks of Homelessness (Short-Term Housing Assistance)

Report the total number of households that received STRMU assistance in Column 1. In Column 2, identify the result of the housing assessment made at time of assistance, or updated in the operating year. (Column 3 provides a description of housing outcomes; therefore, data is not required.) In Row 1a, enter the total number of households served in the prior operating year that received STRMU assistance this year. In Row 1b, enter the total number of households that received STRMU Assistance in the 2 prior operating years that received STRMU assistance this year. *Note: The sum of Column 2 should equal the number of households reported in Column 1.*

Assessment of Households receiving STRMU Assistance

[1] STRMU Housing Assistance	[2] Assessment of Housing Status		[3] HOPWA Client Outcomes
= 247	Maintain Private Housing without subsidy (e.g. Assistance provided/completed and client is stable, not likely to seek additional support)	= 10	Stable/Permanent Housing (PH)
	Other Private Housing without subsidy	= 0	
	Other HOPWA support (PH)	= 131	
	Other housing subsidy (PH)	= 0	
	Institution (e.g. residential and long-term care)	= 4	
	Likely to maintain current housing arrangements, with additional STRMU assistance	= 44	Temporarily Stable, with Reduced Risk of Homelessness
	Transitional Facilities/Short-term (e.g. temporary or transitional arrangement)	= 0	
	Temporary/non-permanent Housing arrangement (e.g. gave up lease, and moved in with family or friends but expects to live there less than 90 days)	= 25	
	Emergency Shelter/street	= 0	Unstable Arrangements
	Jail/Prison	= 7	
	Disconnected	= 16	
	Death	= 10	Life Event
1a. Total number of households that received STRMU assistance in the prior operating year, that also received STRMU assistance in the current operating year.			= 223
1b. Total number of those households that received STRMU assistance in the two (2 years ago) prior operating years that also received STRMU assistance in the current operating year.			= 35

Section 3. HOPWA Outcomes on Access to Care and Support

1A. Status of Households Accessing Care and Support by Project Sponsors delivering HOPWA Housing Assistance/Housing Placement/Case Management

Use Table 1 A for project sponsors that provide HOPWA housing assistance/housing placement with or without case management services. In Table 1A, identify the number of client households receiving any type of HOPWA housing assistance that demonstrated improved access or maintained connections to care and support within the program year by: having a housing plan; having contact with a case manager/benefits counselor; visiting a primary health care provider; accessing medical insurance/assistance; and accessing or qualifying for income benefits.

Note: For information on types and sources of income and medical insurance/assistance, refer to Charts 1C and 1D.

Categories of Services Accessed	Households Receiving Housing Assistance within the Operating Year	Outcome Indicator
1. Has a housing plan for maintaining or establishing stable on-going housing.	328	<i>Support for Stable Housing</i>
2. Has contact with case manager/benefits counselor consistent with the schedule specified in client's individual service plan.	328	<i>Access to Support</i>
3. Had contact with a primary health care provider consistent with the schedule specified in client's individual service plan,	278	<i>Access to Health Care</i>
4. Has accessed and can maintain medical insurance/assistance.	220	<i>Access to Health Care</i>
5. Successfully accessed or maintained qualification for sources of income.	18	<i>Sources of Income</i>

1B. Number of Households Obtaining Employment

In Table 1B, identify the number of recipient households that include persons who obtained an income-producing job during the operating year that resulted from HOPWA funded: job training, employment assistance, education or related case management/counseling services. Note: This includes jobs created by this project sponsor or obtained outside this agency.

Categories of Services Accessed	Number of Households that Obtained Employment	Outcome Indicator
Total number of households that obtained an income-producing job	12	<i>Sources of Income</i>

Chart 1C: Sources of income include, but are not limited to the following (Reference only)

<ul style="list-style-type: none">• Earned Income• Unemployment Insurance• Supplemental Security Income (SSI)• Social Security Disability Income (SSDI)• Veteran's Disability Payment• General Assistance, or use local program name• Temporary Assistance for Needy Families (TANF) income, or use local program name	<ul style="list-style-type: none">• Veteran's Pension• Pension from Former Job• Child Support• Alimony or Other Spousal Support• Retirement Income from Social Security• Private Disability Insurance• Worker's Compensation
--	--

Chart 1D: Sources of medical insurance and assistance include, but are not limited to the following (Reference only)

<ul style="list-style-type: none">• MEDICAID Health Insurance Program, or local program name• Veterans Affairs Medical Services• State Children's Health Insurance Program (SCHIP), or local program name	<ul style="list-style-type: none">• MEDICARE Health Insurance Program, or local program name• AIDS Drug Assistance Program (ADAP)• Ryan White-funded Medical or Dental Assistance
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2A. Status of Households Accessing Care and Support through HOPWA-funded Services receiving Housing Assistance from Other Sources

In Table 2A, identify the number of client households served by project sponsors receiving HOPWA-funded housing placement or case management services who have other and housing arrangements that demonstrated improved access or maintained connections to care and support within the program year by: having a housing plan; having contact with a case manager/benefits counselor; visiting a primary health care provider; accessing medical insurance/assistance; and accessing or qualifying for income benefits. Note: For information on types and sources of income and medical insurance/assistance, refer to Charts 2C and 2D.

Categories of Services Accessed	Households Receiving HOPWA Assistance within the Operating Year	Outcome Indicator
1. Has a housing plan for maintaining or establishing stable on-going housing.	328	<i>Support for Stable Housing</i>
2. Successfully accessed or maintained qualification for sources of income.	328	<i>Sources of Income</i>
3. Had contact with a primary health care provider consistent with the schedule specified in clients individual service plan.	328	<i>Access to Health Care</i>
4. Has accessed and can maintain medical insurance/assistance.	220	<i>Access to Health Care</i>
5. Has contact with case manager, benefits counselor, or housing counselor consistent with the schedule specified in client's individual service plan.	328	<i>Access to Support</i>

2B. Number of Households Obtaining Employment

In Table 2B, identify the number of recipient households that include persons who obtained an income-producing job during the operating year that resulted from HOPWA funded: job training, employment assistance, education or related case management/counseling services. Note: This includes jobs created by this project sponsor or obtained outside this agency.

Categories of Services Accessed	Number of Households that Obtained Employment	Outcome Indicator
Total number of households that obtained an income-producing job	12	<i>Sources of Income</i>

Chart 2C: Sources of income include, but are not limited to the following (Reference only)

- | | |
|--|--|
| <ul style="list-style-type: none">• Earned Income• Unemployment Insurance• Supplemental Security Income (SSI)• Social Security Disability Income (SSDI)• Veteran's Disability Payment• General Assistance, or use local program name• Temporary Assistance for Needy Families (TANF) income, or use local program name | <ul style="list-style-type: none">• Veteran's Pension• Pension from Former Job• Child Support• Alimony or Other Spousal Support• Retirement Income from Social Security• Private Disability Insurance• Worker's Compensation |
|--|--|

Chart 2D: Sources of medical insurance and assistance include, but are not limited to the following (*Reference only*)

- | | |
|---|---|
| <ul style="list-style-type: none">• MEDICAID Health Insurance Program, or local program name• Veterans Affairs Medical Services• State Children's Health Insurance Program (SCHIP), or local program name | <ul style="list-style-type: none">• MEDICARE Health Insurance Program, or local program name• AIDS Drug Assistance Program (ADAP)• Ryan White-funded Medical or Dental Assistance |
|---|---|

PART 5: Worksheet - Determining Housing Stability Outcomes

1. This chart is designed to assess program results based on the information reported in Part 4.

Permanent Housing Assistance	Stable Housing (# of households remaining in program plus 3+4+5+6=#)	Temporary Housing (2)	Unstable Arrangements (1+7+8=#)	Life Event (9)
Tenant-Based Rental Assistance (TBRA)	24	0		
Permanent Facility-based Housing Assistance/Units	0	0		
Transitional/Short-Term Facility-based Housing Assistance/Units	223	0		
Total Permanent HOPWA Housing Assistance	247	0		
Reduced Risk of Homelessness: Short-Term Assistance	Stable/Permanent Housing	Temporarily Stable, with Reduced Risk of Homelessness	Unstable Arrangements	Life Events
Short-Term Rent, Mortgage, and Utility Assistance (STRMU)				
Total HOPWA Housing Assistance				

Background on HOPWA Housing Stability Codes

Stable Permanent Housing/Ongoing Participation

3 = Private Housing in the private rental or home ownership market (without known subsidy, including permanent placement with families or other self sufficient arrangements) with reasonable expectation that additional support is not needed.

4 = Other HOPWA-funded housing assistance (not STRMU), e.g. TBRA or Facility-Based Assistance.

5 = Other subsidized house or apartment (non-HOPWA sources, e.g., Section 8, HOME, public housing).

6 = Institutional setting with greater support and continued residence expected (e.g., residential or long-term care facility).

Temporary Housing

2 = Temporary housing - moved in with family/friends or other short-term arrangement, such as Ryan White subsidy, transitional housing for homeless, or temporary placement in institution (e.g., hospital, psychiatric hospital or other psychiatric facility, substance abuse treatment facility or detox center).

Unstable Arrangements

1 = Emergency shelter or no housing destination such as places not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station, or anywhere outside).

7 = Jail /prison.

8 = Disconnected or disappeared from project support, unknown destination or no assessments of housing needs were undertaken.

Life Event

9 = Death, i.e., remained in housing until death. This characteristic is not factored into the housing stability equation.

Tenant-based Rental Assistance: Stable Housing is the sum of the number of households that (i) remain in the housing and (ii) those that left the assistance as reported under: 3, 4, 5, and 6. Temporary Housing is the number of households that accessed assistance, and left their current housing for a non-permanent housing arrangement, as reported under item: 2. Unstable Situations is the sum of numbers reported under items: 1, 7, and 8.

Permanent Facility-Based Housing Assistance: Stable Housing is the sum of the number of households that (i) remain in the housing and (ii) those that left the assistance as shown as items: 3, 4, 5, and 6. Temporary Housing is the number of households that accessed assistance, and left their current housing for a non-permanent housing arrangement, as reported under item 2. Unstable Situations is the sum of numbers reported under items: 1, 7, and 8.

Transitional/Short-Term Facility-Based Housing Assistance: Stable Housing is the sum of the number of households that (i) continue in the residences (ii) those that left the assistance as shown as items: 3, 4, 5, and 6. Other Temporary Housing is the number of households that accessed assistance, and left their current housing for a non-permanent housing arrangement, as reported under item 2. Unstable Situations is the sum of numbers reported under items: 1, 7, and 8.

Tenure Assessment. A baseline of households in transitional/short-term facilities for assessment purposes, indicate the number of households whose tenure exceeded 24 months.

STRMU Assistance: Stable Housing is the sum of the number of households that accessed assistance for some portion of the permitted 21-week period and there is reasonable expectation that additional support is not needed in order to maintain permanent housing living situation (as this is a time-limited form of housing support) as reported under housing status: Maintain Private Housing with subsidy; Other Private with Subsidy; Other HOPWA support; Other Housing Subsidy; and Institution. Temporarily Stable, with Reduced Risk of Homelessness is the sum of the number of households that accessed assistance for some portion of the permitted 21-week period or left their current housing arrangement for a transitional facility or other temporary/non-permanent housing arrangement and there is reasonable expectation additional support will be needed to maintain housing arrangements in the next year, as reported under housing status: Likely to maintain current housing arrangements, with additional STRMU assistance; Transitional Facilities/Short-term; and Temporary/Non-Permanent Housing arrangements. Unstable Situation is the sum of number of households reported under housing status: Emergency Shelter; Jail/Prison; and Disconnected.

Housing Opportunities for Persons with AIDS (HOPWA) Consolidated Annual Performance and Evaluation Report – (Ryan White Program) Measuring Performance Outcomes

OMB Number 2506-0133 (Expiration Date: 12/31/2010)

Part 1: Grantee Executive Summary

As applicable, complete the charts below followed by the submission of a written narrative to questions A through C, and the completion of Chart D. Chart 1 requests general grantee information and Chart 2 is to be completed for each organization selected or designated as a project sponsor, as defined by CFR 574.3. In Chart 3, indicate each subrecipient organization with a contract/agreement of \$25,000 or greater that assists grantees or project sponsors carrying out their activities. Agreements include: grants, subgrants, loans, awards, cooperative agreements, and other forms of financial assistance; and contracts, subcontracts, purchase orders, task orders, and delivery orders. These elements address requirements in the Federal Funding and Accountability and Transparency Act of 2006 (Public Law 109-282).

1. Grantee Information

HUD Grant Number 12699		Operating Year for this report <i>From (mm/dd/yy) 06/01/2008 To (mm/dd/yy) 05/31/2009</i>		
Grantee Name Charleston				
Business Address		145 King Street, Suite 400		
City, County, State, Zip		Charleston	Charleston County	SC 29401
Employer Identification Number (EIN) or Tax Identification Number (TIN)		57-6000226		DUN & Bradstreet Number (DUNS) if applicable 077990786
Congressional District of Business Address		Congressional District One		
*Congressional District(s) of Primary Service Area(s)		Congressional Districts One and Six		
*Zip Code(s) of Primary Service Area(s)		29401 29403 29407 29412 29455 29492		
*City(ies) and County(ies) of Primary Service Area(s)		City of Charleston and Charleston County		
Organization's Website Address www.charlestoncity.info		Does your organization maintain a waiting list? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, explain in the narrative section how this list is administered.		
Have you prepared any evaluation reports? <i>If so, please indicate the location on an Internet site (url) or attach copy.</i> http://www.charlestoncity.info/shared/docs/0/2008%20caper.pdf				

* Service delivery area information only needed for program activities being directly carried out by the grantee

2. Project Sponsor Information

In Chart 2, provide the following information for each organization designated or selected to serve as a project sponsor, as defined by CFR 574.3.

Project Sponsor Agency Name Roper St. Francis Foundation / RSFH Ryan White Program		Parent Company Name, if applicable Roper St. Francis Healthcare		
Name and Title of Contact at Project Sponsor Agency	Ella Fleming, Ryan White HOPWA Coordinator			
Email Address	Anne.Sass@rsfh.com			
Business Address	125 Doughty Street, Suite 790 Charleston, SC 29403-5785			
City, County, State, Zip,	Charleston	Charleston	SC	29403-5785
Phone Number (with area codes)	843-789-1614		Fax Number (with area code) 843-724-2820	
Employer Identification Number (EIN) or Tax Identification Number (TIN)	57-1068509		DUN & Bradstreet Number (DUNs) if applicable 830251286	
Congressional District of Business Location of Sponsor	S.C. 01			
Congressional District(s) of Primary Service Area(s)	S.C. 01, S.C. 06			
Zip Code(s) of Primary Service Area(s)	Charleston County: 29401 29403 29404 29405 29406 29407 29412 29414 29418 29424 29425 29426 29429 29438 29439 29449 29451 29455 29456 29458 29464 29466 29470 29482 29487 (PO Box Zip Codes) 29402 29413 29419 29422 29423 29424 29425 29457 Berkeley County: 29410 29430 29431 29434 29436 29445 29450 29453 29461 29468 29469 29479 29492 (PO Box Zip Code) 29476 Dorchester County: 29420 29437 29448 29471 29472 29477 29483 29458 (PO Box Zip Codes) 29447 29484			
City(ies) and County(ies) of Primary Service Area(s)	City of Charleston		Charleston, Berkeley and Dorchester Counties	
Total HOPWA contract amount for this Organization	\$150,000 (2008-2009)			
Organization's Website Address www.rsfh.com/foundation		Does your organization maintain a waiting list? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If yes, explain in the narrative section how this list is administered. We currently have a waiting list for our TBRA Program. Our grant request for year 2009-2010 was for a greater amount than we received this year, therefore we expected to be able to expand this portion of our program. However, we have been informed that our funding amount was reduced, so we had to implement a waiting list. This list will be administered by the HOPWA coordinator and each person will be placed on the bottom of the list once they complete the HOPWA application and the application to be sent to Fort Mill Housing.		
Is the sponsor a nonprofit organization? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Please check if yes and a faith-based organization. <input type="checkbox"/> Please check if yes and a grassroots organization. <input type="checkbox"/>				

3. Subrecipient Information

In Chart 3, provide the following information for each subrecipient with a contract/agreement of \$25,000 or greater that assist the grantee or project sponsors to carry out their administrative or service delivery functions. Agreements include: grants, subgrants, loans, awards, cooperative agreements, and other forms of financial assistance; and contracts, subcontracts, purchase orders, task orders, and delivery orders. (Organizations listed may have contracts with project sponsors or other organizations beside the grantee.) These elements address requirements in the Federal Funding and Accountability and Transparency Act of 2006 (Public Law 109-282).

Subrecipient Name Fort Mill Housing Services, Inc.		Parent Company (if applicable)	
Name and Title of Contact at Subrecipient	Thomas Rowe, C.E.O.		
Email Address	trowe@comporium.net		
Business Address	P.O. Box 220		
City, State, Zip, County	Fort Mill	SC	29716
Phone Number (with area code)	803-547-6787		Fax Number (with area code) 803-548-2125
Employer Identification Number (EIN) or Tax Identification Number (TIN)	57-1063487		DUN & Bradstreet Number (DUNS) if applicable
North American Industry Classification System (NAICS) Code			
Congressional District of Location	Charleston, SC		
Congressional District of Primary Service Area			
Zip Code of Primary Service Area(s)	Charleston County: 29401 29403 29404 29405 29406 29407 29412 29414 29418 29424 29425 29426 29429 29438 29439 29449 29451 29455 29456 29458 29464 29466 29470 29482 29487 (PO Box Zip Codes) 29402 29413 29419 29422 29423 29424 29425 29457 Berkeley County: 29410 29430 29431 29434 29436 29445 29450 29453 29461 29468 29469 29479 29492 (PO Box Zip Code) 29476 Dorchester County: 29420 29437 29448 29471 29472 29477 29483 29458 (PO Box Zip Codes) 29447 29484		
City(ies) and County(ies) of Primary Service Area(s)	Charleston County Berkeley County Dorchester County		
Total HOPWA Contract Amount	\$16,900.00		

A. Grantee and Community Overview

Provide a one to three page narrative summarizing major achievements and highlights that were proposed and completed during the program year. Include a brief description of the grant organization, area of service, the name(s) of the program contact(s), and an overview of the range/type of housing activities provided. This overview may be used for public information, including posting on HUD's website. *Note: Text fields are expandable.*

The Ryan White Part C HIV Care Management Program is a federally funded, non-profit program that helps coordinate comprehensive medical care ranging from medical appointments to the prevention of homelessness, for low income families and individuals living with HIV. Over the last year, the Ryan White Program has grown from having only three employees to having seven; including two new case managers, a housing coordinator, and a community liaison who assists in the enrollment process for government funded programs such as SSI and Medicaid. In calendar year 2008, we served 318 clients; 63% Male and 37% Female; 63% African American, 32% Caucasian, and 5% Hispanic/Other. In the first quarter of 2009, we have enrolled 39 new patients. Ashley Redmond is the Ryan White Program Manager. Ella Fleming is the Housing coordinator, who manages the HOPWA grant.

The Roper St. Francis HIV Care Management Program received HOPWA funding for the first time in 2008. It has been a welcome addition to our program. It was our anticipation that we would serve 33 patients throughout our first program year. As of May 31, 2009, we have served 89 clients with HOPWA services. As evidenced by our services, this program has been quite a success. In addition to our vast increase in enrollments and referrals, as our currently enrolled clients continue to learn about the availability of this service, our need will grow.

Our program year actually began later than the normal program year of June 1- May 31. We were able to begin providing services in October 2008. As our program started, we provided Short Term Rent Mortgage and Utilities (STRMU) to eligible clients requesting housing assistance. This allowed us make payments for clients, including rent/mortgage, gas/electricity bills, and water bills, ensuring that our clients maintained safe and stable housing. We also found apartments or homes for clients that were more stable and therefore more conducive to treatment for their medical condition. As the program year progressed, we continued to work on contracting with Fort Mill Housing to provide Tenant Based Rental Assistance (TBRA), which is a long term housing option that mimics Section 8 housing. This process took quite a while. We finally contracted with Fort Mill Housing in March 2009 and have since enrolled 3 clients in this program. We did reach our goal of providing TBRA to 3 clients; however, we did not spend the budgeted amount of money. A portion of these funds were re-allocated to provide STRMU services to more clients, while the remaining amount stayed in use for TBRA. These 3 individuals will remain on TBRA for the next program year.

B. Annual Performance under the Action Plan

Provide a narrative addressing each of the following four items:

1. Outputs Reported. Describe significant accomplishments or challenges in achieving the number of housing units supported and the number households assisted with HOPWA funds during this operating year compared to plans for this assistance, as approved in the Consolidated Plan/Action Plan. Describe how HOPWA funds were distributed during your program year among different categories of housing and geographic areas to address needs throughout the grant service area, consistent with approved plans.

2. Outcomes Assessed. Assess program goals against actual client outcomes for achieving housing stability, reducing risks of homelessness, and improving access to care. If current year results are lower than the national program targets (80 percent of HOPWA clients maintain housing stability, avoid homelessness and access care), please describe the steps being taken to achieve the national outcome goal in next operating year.

3. Coordination. Report on program coordination with other mainstream housing and supportive services resources, including the use of committed leveraging from other public and private sources that helped to address needs for eligible persons identified in the Consolidated Plan/Strategic Plan.

4. Technical Assistance. Describe any program technical assistance needs and how they would benefit program beneficiaries.

1. Outputs Reported: This being the first year that HOPWA funds were received, we were rather conservative with our predictions. When completing the budget for the initial grant request, we planned our funding based on having to make rental payments for the entire allotted amount of 21 weeks. After having carried out the program, we realized that often

clients only need assistance for one or two months, not the entire 5 month and one week period. This allowed us to be able to help a larger number of clients, and in turn, increase their health outcomes. Our goal was to serve 30 clients with STRMU and 3 with TBRA. As of May 31, 2009, we have served 89 clients; 3 of which are receiving TBRA. We nearly tripled our goal.

2. Outputs Assessed: We assessed our outputs according to number of services provided. If we provided fewer than four HOPWA services to a client, then we considered them stably housed, not requesting further assistance. Based on this, 32 are permanently housed and probably will not request further assistance; 57 are stably housed, but may still need some assistance; three are enrolled in the TBRA program and will continue to be stably housed for at least one year. We have reduced the risk homelessness for 100% of the clients who requested HOPWA assistance. We have many clients who are living in stable housing, making payments on their own; however, the economy is causing many clients anxiety for fear of losing their jobs, which would lead to the inability to make rent and bill payments. So, while their current situation is conducive to independent and stable housing, there is no guarantee that it will last. By decreasing their risk of homelessness and having assistance available, it is our hope that they will remain in stable housing and continue to thrive medically, despite the condition of the economy.

3. We have partnered with Fort Mill Housing Services to provide Tenant Based rental assistance, a long term program that mimics Section 8. This collaboration, while very new has been very efficient and beneficial to our clients. This program allows clients to pay 30% of their income towards rent and then our program pays the remaining amount. This collaboration allows our clients the security of affordable rental rates, which in the tri-county area is very hard to find.

4. No technical assistance is requested at this time.

C. Barriers and Trends Overview

Provide a narrative addressing items 1 through 3. Explain how barriers and trends affected your program's ability to achieve the objectives and outcomes discussed in the previous section.

1. Describe any barriers (including regulatory and non-regulatory) encountered, actions taken in response to barriers, and recommendations for program improvement. Provide an explanation for each barrier selected.

<input type="checkbox"/> HOPWA/HUD Regulations	<input type="checkbox"/> Planning	<input checked="" type="checkbox"/> Housing Availability	<input type="checkbox"/> Rent Determination and Fair Market Rents
<input type="checkbox"/> Discrimination/Confidentiality	<input type="checkbox"/> Multiple Diagnoses	<input type="checkbox"/> Eligibility	<input type="checkbox"/> Technical Assistance or Training
<input type="checkbox"/> Supportive Services	<input type="checkbox"/> Credit History	<input type="checkbox"/> Rental History	<input type="checkbox"/> Criminal Justice History
<input checked="" type="checkbox"/> Housing Affordability	<input checked="" type="checkbox"/> Other, please explain further		

2. Describe any trends in the community that may affect the way in which the needs of persons living with HIV/AIDS are being addressed, and provide any other information important to the future provision of services to this population.

3. Identify any evaluations, studies, or other assessments of the HOPWA program that are available to the public.

1. Housing affordability is an issue in the tri-county area of South Carolina. This area is both a coastal region and a tourist destination, which allows for higher rental rates. An annual income of \$26,874 or \$12.92 per hour would be necessary to be able to afford fair market rent on a two bedroom apartment (\$672 per month), spending no more than 30% of one's income. Minimum wage is \$6.55 per hour. An individual would have to work 79 hours per week, nearly 2 full-time jobs, at minimum wage to afford a two bedroom apartment. Within the tri-county area, 12.2% of the population lives below the poverty level. In calendar year 2008, we served 318 clients. Of these clients, 56% were equal to or below the federal poverty level. Our client population is much more in need than the whole of the tri-county area. These rental rates are not affordable for a portion of tri-county area residents and the majority of our client population.

In addition to housing affordability, housing availability is also an issue. Within the tri-county area, there are several income-based housing units/apartments. However, the waiting lists for these places are typically six months to a year. With the majority of our population being equal to or below the federal poverty level, affordable housing is in high demand. The lack of both affordable and available housing often leads to unstable housing or homelessness. Unstable housing has been found to lead to delayed entry into care, discontinuous care, recent breaks in care, dropping in and out of care, and/or changing providers often. All of these situations can be very detrimental to the health and well-being of persons living with HIV/AIDS.

Lastly, limited funding is also an issue. Since July 2008, we have had 149 new enrollments in our HIV program.

Slightly less than half of our new referrals were persons "out of care" and were referred by Roper St. Francis Healthcare

inpatient case managers. This trend is expected to continue in the months to come and we expect to experience a proportional increase in the number of clients in need of housing assistance. In addition to our increase in enrollments, due the state of the economy in our country, there has been an influx of lay offs, leading to client unemployment. These clients in turn, need assistance with everyday expenses such as rent and bill payments. While there are other programs providing HIV care to Lowcountry residents, the need for care continues to outweigh the available resources.

2. As previously stated, funding is an issue in being able to provide adequate housing services to those in need. Evidenced by the economical state of our nation and South Carolina, unemployment rates are on the rise, resulting in the inability to make one's priority expenses (i.e. rent/mortgage, electricity, water). Despite the increase in need for housing assistance, funding within the community has either remained flat or decreased, creating a barrier to providing adequate care.

3. There are numerous evaluations, studies, and assessments about the HOPWA Program that are available to the public. I have listed several below:

~Housing Opportunities for Persons with AIDS- Community Collaborations to Provide Housing Assistance and Related Services for Low-Income Persons who are living with HIV/AIDS and their families--

<http://www.hud.gov/offices/cpd/aidshousing>

~South Carolina FY 2009 HOPWA Program Annual Action Plan

<http://www.sccommerce.com/DocDirectory/GrantsFolder/ConsolidatedPlanDocuments/HOPWAAAnnualPlan-2009.pdf>

~HOPWA Performance Profile-South Carolina- City of Charleston, SC

<http://www.hud.gov/offices/cpd/aidshousing/reports/perfpro/formula/CharlestonSC.pdf>

D. Unmet Housing Needs: An Assessment of Unmet Housing Needs

In Chart 1, provide an assessment of the number of HOPWA-eligible households that require housing assistance but are not currently served by HOPWA in this service area.

In Line 1, report the total unmet need of the geographical service area, as reported in *Unmet Needs for Persons with HIV/AIDS*, Table 1B of the Consolidated or Annual Plan(s), or as reported under HOPWA worksheet in the Needs Workbook of the Consolidated Planning Management Process (CPMP) tool. *Note: Report most current data available, through Consolidated or Annual Plan(s), and account for local housing issues, or changes in HIV/AIDS cases, by using combination of one or more of the sources in Chart 2.*

In Rows a through c, enter the number of HOPWA-eligible households by type of housing assistance whose housing needs are not met. For an approximate breakdown of overall unmet need by type of housing assistance refer to the Consolidated or Annual Plan (s), CPMP tool or local distribution of funds.

1. Assessment of Unmet Need for HOPWA-eligible Households

*****Specifically for the RSFH-Ryan White Program client population*****

1. Total number of households that have unmet housing needs	= 130 (Income at or below 100% of FPL)
From Item 1, identify the number of households with unmet housing needs by type of housing assistance	
a. Tenant-Based Rental Assistance (TBRA)	= 65 (i.e. about 50% of our clients receive SSI or SSDI)
b. Short-Term Rent, Mortgage and Utility payments (STRMU)	= 130
c. Housing Facilities, such as community residences, SRO dwellings, other housing facilities	= <10

2. Recommended Data Sources for Assessing Unmet Need (check all sources used)

= Data as reported in the area Consolidated Plan, e.g. Table 1B, CPMP charts, and related narratives
= Data established by area HIV/AIDS housing planning and coordination efforts, e.g. Continuum of Care
= Data from client information provided in Homeless Management Information Systems (HMIS)
= Data from project sponsors or housing providers, including waiting lists for assistance or other assessments on need
= Data from prisons or jails on persons being discharged with HIV/AIDS, if mandatory testing is conducted
X = Data from local Ryan White Planning Councils or reported in CARE Act Data Reports, e.g. number of clients with permanent housing
= Data collected for HIV/AIDS surveillance reporting or other health assessments, e.g. local health department or CDC surveillance data

PART 2: Sources of Leveraging

Report the source(s) of cash or in-kind leveraged federal, state, local or private resources identified in the Consolidated or Annual Plan and used in the delivery of the HOPWA program and the amount of leveraged dollars.

[1] Sources of Leveraging		Total Amount of Leveraged Dollars (for this operating year)	
		[2] Housing Assistance	[3] Supportive Services and other non-direct housing costs
1.	Program Income	=	=
2.	Federal government (please specify):	=	=
		=	=
		=	=
		=	=
3.	State government (please specify)	=	=
		=	=
		=	=
		=	=
4.	Local government (please specify)	=	=
	City of Charleston-HOPWA: \$150,000 total	= \$121,000.00 (Direct Services)	= \$29,000.00 (Activities, Salary, & Fringe)
		=	=
		=	=
5.	Foundations and other private cash resources (please specify)	=	=
		=	=
		=	=
		=	=
6.	In-kind Resources	=	=
7.	Resident rent payments in Rental, Facilities, and Leased Units	=	=
8.	Grantee/project sponsor (Agency) cash	=	=
9.	TOTAL (Sum of 1-7)	= \$121,000.00	= \$29,000.00

PART 3: Accomplishment Data - Planned Goal and Actual Outputs

In Chart 1, enter performance information (goals and actual outputs) for all activities undertaken during the operating year supported with HOPWA funds. Performance is measured by the number of households and units of housing that were supported with HOPWA or other federal, state, local, or private funds for the purposes of providing housing assistance and support to persons living with HIV/AIDS and their families. *Note: The total households assisted with HOPWA funds and reported in PART 3 of the CAPER should be the same as reported in the annual year-end IDIS data, and goals reported should be consistent with the Annual Plan information. Any discrepancies or deviations should be explained in the narrative section of PART 1.*

1. HOPWA Performance Planned Goal and Actual Outputs

	HOPWA Performance Planned Goal and Actual	Output Households				Funding	
		HOPWA Assistance		Non-HOPWA		e.	f.
		a.	b.	c.	d.		
		Goal	Actual	Goal	Actual	HOP WA Budget	HOP WA Actual
	Housing Subsidy Assistance	Output Households					
1.	Tenant-Based Rental Assistance	3	3	0	0	\$16,200.00	\$2,186.00 as of 5/21/09
2a.	Households in permanent housing facilities that receive operating subsidies/leased units	0	0	0	0	0	0
2b.	Households in transitional/short-term housing facilities that receive operating subsidies/leased units	0	0	0	0	0	0
3a.	Households in permanent housing facilities developed with capital funds and placed in service during the program year	0	0	0	0	0	0
3b.	Households in transitional/short-term housing facilities developed with capital funds and placed in service during the program year	0	0	0	0	0	0
4.	Short-Term Rent, Mortgage and Utility Assistance	30	90	0	0	\$100,800.00	\$114,037.04
5.	Adjustments for duplication (subtract)			0	0		
6.	Total Housing Subsidy Assistance	30	90	0	0	\$117,000.00	\$116,223.04
	Housing Development (Construction and Stewardship of facility based housing)	Output Units					
7.	Facility-based units being developed with capital funding but not opened (show units of housing planned)	N/A	N/A	N/A	N/A	N/A	N/A
8.	Stewardship Units subject to 3 or 10 year use agreements						
		N/A	N/A	N/A	N/A		
9.	Total Housing Developed						
	Supportive Services	Output Households					
10a.	Supportive Services provided by project sponsors also delivering HOPWA housing assistance	90				0	0
10b.	Supportive Services provided by project sponsors serving households who have other housing arrangements	N/A				N/A	N/A
11.	Adjustment for duplication (subtract)						
12.	Total Supportive Services	90				0	0
	Housing Placement Assistance Activities						
13.	Housing Information Services	25				\$14,500.00	\$9,703.31
14.	Permanent Housing Placement Services	17					
15.	Adjustment for duplication						
16.	Total Housing Placement Assistance					\$14,500.00	\$9,703.31
	Grant Administration and Other Activities						
17.	Resource Identification to establish, coordinate and develop housing assistance resources					\$14,500.00	\$9,703.31
18.	Technical Assistance (if approved in grant agreement)					N/A	N/A
19.	Grantee Administration (maximum 3% of total HOPWA grant)					N/A	N/A
20.	Project Sponsor Administration (maximum 7% of portion of HOPWA grant awarded)					\$4,000.00	\$3,904.26
	Total Expenditures for program year (Sum of rows 6, 9, 12, 16, 17, and 20)					\$150,000.00	\$139,533.92

2. Listing of Supportive Services

Report on the use of HOPWA funds for all supportive services. In Rows 1 through 16, provide the (unduplicated) total of all households and expenditures for each type of supportive service for all project sponsors.

Supportive Services		Number of Households Receiving HOPWA Assistance	Amount of HOPWA Funds Expended
1.	Adult day care and personal assistance	0	0
2.	Alcohol and drug abuse services	0	0
3.	Case management/client advocacy/ access to benefits & services	90	0
4.	Child care and other child services	0	0
5.	Education	90	0
6.	Employment assistance and training	0	0
7.	Health/medical/intensive care services, if approved Note: Client records must conform with 24 CFR §574.310	90	0
8.	Legal services	0	0
9.	Life skills management (outside of case management)	0	0
10.	Meals/nutritional services	5	0
11.	Mental health services	28	0
12.	Outreach	0	0
13.	Transportation	39	0
14.	Other Activity (if approved in grant agreement). Specify:	0	0
15.	Adjustment for Duplication (subtract)		
16.	TOTAL Households receiving Supportive Services (unduplicated)	90	0

Part 4: Summary of Performance Outcomes

HOPWA Long-term Performance Objective: *Eighty percent of HOPWA clients will maintain housing stability, avoid homelessness, and access care each year through 2011.*

Section 1. Housing Stability: Assessment of Client Outcomes on Maintaining Housing Stability (Permanent Housing and Related Facilities)

In Column 1, report the total number of eligible households that received HOPWA housing assistance, by type. In Column 2, enter the number of households continuing to access each type of housing assistance, the following year. In Column 3, report the housing status of all households that exited the program. Columns 2 (Number of Households Continuing) and 3 (Exited Households) summed will equal the total households reported in Column 1. *Note: Refer to the housing stability codes that appear in Part 5: Worksheet - Determining Housing Stability Outcomes.*

[A] Permanent Housing Assistance	[1] Total Number of Households Receiving Housing Assistance	[2] Assessment: Number of Households Continuing with this Housing (per plan or expectation for next year)		[3] Assessment: Number of Exited Households and Housing Status			
Tenant-Based Rental Assistance	= 3		= 3	1 Emergency Shelter/Streets	= 0		
				2 Temporary Housing	= 0		
				3 Private Housing	= 0		
				4 Other HOPWA	= 0		
				5 Other Subsidy	= 0		
				6 Institution	= 0		
				7 Jail/Prison	= 0		
				8 Disconnected/Unknown	= 0		
				9 Death	= 0		
Permanent Supportive Housing Facilities/Units	= 0		= 0	1 Emergency Shelter/Streets	= 0		
				2 Temporary Housing	= 0		
				3 Private Housing	= 0		
				4 Other HOPWA	= 0		
				5 Other Subsidy	= 0		
				6 Institution	= 0		
				7 Jail/Prison	= 0		
				8 Disconnected/Unknown	= 0		
				9 Death	= 0		
[B] Transitional Housing Assistance	[1] Total Number of Households Receiving Housing Assistance	[2] Of the Total Number of Households Receiving Housing Assistance this Operating Year		[3] Assessment: Number of Exited Households and Housing Status			
Transitional/Short-Term Supportive Facilities/Units	= 0	Total number of households that will continue in residences:	= 0	1 Emergency Shelter/Streets	= 0		
		2 Temporary Housing		= 0			
		3 Private Housing		= 0			
		4 Other HOPWA		= 0			
				Total number of households whose tenure exceeded 24	= 0	5 Other Subsidy	= 0
				6 Institution		= 0	
				7 Jail/Prison		= 0	
				8 Disconnected/unknown		= 0	

		months:		9 Death	= 0
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Section 2. Prevention of Homelessness: Assessment of Client Outcomes on Reduced Risks of Homelessness (Short-Term Housing Assistance)

Report the total number of households that received STRMU assistance in Column 1. In Column 2, identify the result of the housing assessment made at time of assistance, or updated in the operating year. (Column 3 provides a description of housing outcomes; therefore, data is not required.) In Row 1a, enter the total number of households served in the prior operating year that received STRMU assistance this year. In Row 1b, enter the total number of households that received STRMU Assistance in the 2 prior operating years that received STRMU assistance this year. *Note: The sum of Column 2 should equal the number of households reported in Column 1.*

Assessment of Households receiving STRMU Assistance

[1] STRMU Housing Assistance	[2] Assessment of Housing Status		[3] HOPWA Client Outcomes
= 90	Maintain Private Housing without subsidy (e.g. Assistance provided/completed and client is stable, not likely to seek additional support)	= 29 (Received <4 HOPWA services during program year)	Stable/Permanent Housing (PH)
	Other Private Housing without subsidy	= 0	
	Other HOPWA support (PH)	= 3 (Transitioned to TBRA)	
	Other housing subsidy (PH)	= 0	
	Institution (e.g. residential and long-term care)	= 0	
	Likely to maintain current housing arrangements, with additional STRMU assistance	= 57	Temporarily Stable, with Reduced Risk of Homelessness
	Transitional Facilities/Short-term (e.g. temporary or transitional arrangement)	= 0	
	Temporary/non-permanent Housing arrangement (e.g. gave up lease, and moved in with family or friends but expects to live there less than 90 days)	= 0	
	Emergency Shelter/street	= 0 (as of 4/30/09)	Unstable Arrangements
	Jail/Prison	= 0 (as of 4/30/09)	
	Disconnected	= 0 (as of 4/30/09)	
	Death	= 1	Life Event
1a. Total number of households that received STRMU assistance in the prior operating year, that also received STRMU assistance in the current operating year.			= N/A
1b. Total number of those households that received STRMU assistance in the two (2 years ago) prior operating years, that also received STRMU assistance in the current operating year.			= N/A

Section 3. HOPWA Outcomes on Access to Care and Support

1A. Status of Households Accessing Care and Support by Project Sponsors delivering HOPWA Housing Assistance/Housing Placement/Case Management

Use Table 1 A for project sponsors that provide HOPWA housing assistance/housing placement with or without case management services. In Table 1A, identify the number of client households receiving any type of HOPWA housing assistance that demonstrated improved access or maintained connections to care and support within the program year by: having a housing plan; having contact with a case manager/benefits counselor; visiting a primary health care provider; accessing medical insurance/assistance; and accessing or qualifying for income benefits. *Note: For information on types and sources of income and medical insurance/assistance, refer to Charts 1C and 1D.*

Categories of Services Accessed	Households Receiving Housing Assistance within the Operating Year	Outcome Indicator
1. Has a housing plan for maintaining or establishing stable on-going housing.	89	<i>Support for Stable Housing</i>
2. Has contact with case manager/benefits counselor consistent with the schedule specified in client's individual service plan..	89	<i>Access to Support</i>
3. Had contact with a primary health care provider consistent with the schedule specified in client's individual service plan,	89	<i>Access to Health Care</i>
4. Has accessed and can maintain medical insurance/assistance.	89	<i>Access to Health Care</i>
5. Successfully accessed or maintained qualification for sources of income.	88	<i>Sources of Income</i>

1B. Number of Households Obtaining Employment

In Table 1B, identify the number of recipient households that include persons who obtained an income-producing job during the operating year that resulted from HOPWA funded: job training, employment assistance, education or related case management/counseling services. Note: This includes jobs created by this project sponsor or obtained outside this agency.

Categories of Services Accessed	Number of Households that Obtained Employment	Outcome Indicator
Total number of households that obtained an income-producing job	N/A	<i>Sources of Income</i>

Chart 1C: Sources of income include, but are not limited to the following (Reference only)

<ul style="list-style-type: none">• Earned Income• Unemployment Insurance• Supplemental Security Income (SSI)• Social Security Disability Income (SSDI)• Veteran's Disability Payment• General Assistance, or use local program name• Temporary Assistance for Needy Families (TANF) income, or use local program name	<ul style="list-style-type: none">• Veteran's Pension• Pension from Former Job• Child Support• Alimony or Other Spousal Support• Retirement Income from Social Security• Private Disability Insurance• Worker's Compensation
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Chart 1D: Sources of medical insurance and assistance include, but are not limited to the following (Reference only)

<ul style="list-style-type: none">• MEDICAID Health Insurance Program, or local program name• Veterans Affairs Medical Services• State Children's Health Insurance Program (SCHIP), or local program name	<ul style="list-style-type: none">• MEDICARE Health Insurance Program, or local program name• AIDS Drug Assistance Program (ADAP)• Ryan White-funded Medical or Dental Assistance
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2A. Status of Households Accessing Care and Support through HOPWA-funded Services receiving Housing Assistance from Other Sources

In Table 2A, identify the number of client households served by project sponsors receiving HOPWA-funded housing placement or case management services who have other and housing arrangements that demonstrated improved access or maintained connections to care and support within the program year by: having a housing plan; having contact with a case manager/benefits counselor; visiting a primary health care provider; accessing medical insurance/assistance; and accessing or qualifying for income benefits. Note: For information on types and sources of income and medical insurance/assistance, refer to Charts 2C and 2D.

Categories of Services Accessed	Households Receiving HOPWA Assistance within the Operating Year	Outcome Indicator
1. Has a housing plan for maintaining or establishing stable on-going housing.	89	<i>Support for Stable Housing</i>
2. Successfully accessed or maintained qualification for sources of income.	88	<i>Sources of Income</i>
3. Had contact with a primary health care provider consistent with the schedule specified in clients individual service plan.	89	<i>Access to Health Care</i>
4. Has accessed and can maintain medical insurance/assistance.	89	<i>Access to Health Care</i>
5. Has contact with case manager, benefits counselor, or housing counselor consistent with the schedule specified in client's individual service plan.	89	<i>Access to Support</i>

2B. Number of Households Obtaining Employment

In Table 2B, identify the number of recipient households that include persons who obtained an income-producing job during the operating year that resulted from HOPWA funded: job training, employment assistance, education or related case management/counseling services. Note: This includes jobs created by this project sponsor or obtained outside this agency.

Categories of Services Accessed	Number of Households that Obtained Employment	Outcome Indicator
Total number of households that obtained an income-producing job	N/A	<i>Sources of Income</i>

Chart 2C: Sources of income include, but are not limited to the following (*Reference only*)

- | | |
|--|--|
| <ul style="list-style-type: none">• Earned Income• Unemployment Insurance• Supplemental Security Income (SSI)• Social Security Disability Income (SSDI)• Veteran's Disability Payment• General Assistance, or use local program name• Temporary Assistance for Needy Families (TANF) income, or use local program name | <ul style="list-style-type: none">• Veteran's Pension• Pension from Former Job• Child Support• Alimony or Other Spousal Support• Retirement Income from Social Security• Private Disability Insurance• Worker's Compensation |
|--|--|

Chart 2D: Sources of medical insurance and assistance include, but are not limited to the following (*Reference only*)

- | | |
|---|---|
| <ul style="list-style-type: none">• MEDICAID Health Insurance Program, or local program name• Veterans Affairs Medical Services• State Children's Health Insurance Program (SCHIP), or local program name | <ul style="list-style-type: none">• MEDICARE Health Insurance Program, or local program name• AIDS Drug Assistance Program (ADAP)• Ryan White-funded Medical or Dental Assistance |
|---|---|

PART 5: Worksheet - Determining Housing Stability Outcomes

1. This chart is designed to assess program results based on the information reported in Part 4.

Permanent Housing Assistance	Stable Housing (# of households remaining in program plus 3+4+5+6=#)	Temporary Housing (2)	Unstable Arrangements (1+7+8=#)	Life Event (9)
Tenant-Based Rental Assistance (TBRA)	3	0	0	0
Permanent Facility-based Housing Assistance/Units	0	0	0	0
Transitional/Short-Term Facility-based Housing Assistance/Units	0	0	0	0
Total Permanent HOPWA Housing Assistance	3	0	0	0
Reduced Risk of Homelessness: Short-Term Assistance	Stable/Permanent Housing	Temporarily Stable, with Reduced Risk of Homelessness	Unstable Arrangements	Life Events
Short-Term Rent, Mortgage, and Utility Assistance (STRMU)	29	57	0	1
Total HOPWA Housing Assistance	32	57	0	1

Background on HOPWA Housing Stability Codes

Stable Permanent Housing/Ongoing Participation

3 = Private Housing in the private rental or home ownership market (without known subsidy, including permanent placement with families or other self sufficient arrangements) with reasonable expectation that additional support is not needed.

4 = Other HOPWA-funded housing assistance (not STRMU), e.g. TBRA or Facility-Based Assistance.

5 = Other subsidized house or apartment (non-HOPWA sources, e.g., Section 8, HOME, public housing).

6 = Institutional setting with greater support and continued residence expected (e.g., residential or long-term care facility).

Temporary Housing

2 = Temporary housing - moved in with family/friends or other short-term arrangement, such as Ryan White subsidy, transitional housing for homeless, or temporary placement in institution (e.g., hospital, psychiatric hospital or other psychiatric facility, substance abuse treatment facility or detox center).

Unstable Arrangements

1 = Emergency shelter or no housing destination such as places not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station, or anywhere outside).

7 = Jail /prison.

8 = Disconnected or disappeared from project support, unknown destination or no assessments of housing needs were undertaken.

Life Event

9 = Death, i.e., remained in housing until death. This characteristic is not factored into the housing stability equation.

Tenant-based Rental Assistance: Stable Housing is the sum of the number of households that (i) remain in the housing and (ii) those that left the assistance as reported under: 3, 4, 5, and 6. Temporary Housing is the number of households that accessed assistance, and left their current housing for a non-permanent housing arrangement, as reported under item: 2. Unstable Situations is the sum of numbers reported under items: 1, 7, and 8.

Permanent Facility-Based Housing Assistance: Stable Housing is the sum of the number of households that (i) remain in the housing and (ii) those that left the assistance as shown as items: 3, 4, 5, and 6. Temporary Housing is the number of households that accessed assistance, and left their current housing for a non-permanent housing arrangement, as reported under item 2. Unstable Situations is the sum of numbers reported under items: 1, 7, and 8.

Transitional/Short-Term Facility-Based Housing Assistance: Stable Housing is the sum of the number of households that (i) continue in the residences (ii) those that left the assistance as shown as items: 3, 4, 5, and 6. Other Temporary Housing is the number of households that accessed assistance, and left their current housing for a non-permanent housing arrangement, as reported under item 2. Unstable Situations is the sum of numbers reported under items: 1, 7, and 8.

Tenure Assessment. A baseline of households in transitional/short-term facilities for assessment purposes, indicate the number of households whose tenure exceeded 24 months.

STRMU Assistance: Stable Housing is the sum of the number of households that accessed assistance for some portion of the permitted 21-week period and there is reasonable expectation that additional support is not needed in order to maintain permanent housing living situation (as this is a time-limited form of housing support) as reported under housing status: Maintain Private Housing with subsidy; Other Private with Subsidy; Other HOPWA support; Other Housing Subsidy; and Institution. Temporarily Stable, with Reduced Risk of Homelessness is the sum of the number of households that accessed assistance for some portion of the permitted 21-week period or left their current housing arrangement for a transitional facility or other temporary/non-permanent housing arrangement and there is reasonable expectation additional support will be needed to maintain housing arrangements in the next year, as reported under housing status: Likely to maintain current housing arrangements, with additional STRMU assistance; Transitional Facilities/Short-term; and Temporary/Non-Permanent Housing arrangements. Unstable Situation is the sum of number of households reported under housing status: Emergency Shelter; Jail/Prison; and Disconnected.